

Arrowhead United Way

2010-11 Funding Criteria

1. Agency Criteria: Qualifications be for an agency to be eligible to receive funding:
 - Demonstrated strong financial position.
 - At least two years in existence as a 501 (c) (3) tax exempt organization.
 - Program service area aligns with AUW service area.
 - Agency has a diverse board of directors that meets regularly and according to bylaws.
 - Attendance at one entire bidders conference and one entire outcomes training session.
 - Paid agency staff may not be a voting member of the agency's board of directors.

2. Funding Application process: What specific guidelines should be met?
 - Submit an application by the due date and time.
 - Submit all attachments specified in the AUW Grant application.
 - Turn in a complete application with all instructions followed and all questions answered.

3. Agency Review Process: What may be verified when an agency submits an application?
 - Agency and programs are operated efficiently.
 - Programs impact people's lives.
 - Programs should network and collaborate with other organizations.
 - Agency's board of directors monitors agency and its operations.

4. Funding Determinations: How will the councils determine what agencies will be selected for funding?
 - Agency will need to pass evaluation checklist/scoring sheet.
 - Program aligns with focus area goals and outcomes (see AUW Focus Areas Outcomes sheet).
 - Programs will be evaluated for duplication or overlapping programs of funded agencies.
 - Agency is able to provide required statistical data.
 - Agency is able to measure and assess success of program(s).
 - Agency is able to produce program outcomes and statistical information.
 - If council determines a site visit is required, the results are positive.
 - AUW Audit Review report states that the agency is financially healthy.

5. Requirements for agency to maintain funding:
 - Agency meets required reporting due dates.
 - Agency complies with AUW's requests to verify agency information.
 - Agency's auditor is part of the California Society of CPA's Peer Review Program.

6. Agency Annual Financial Reporting Criteria: With the AUW Funding Application agencies must submit a current annual audit or annual financial report based on the agency's total annual revenue as required below. This report may not be more than 18 months old.
 - a) \$0-\$15,000: Year-end internally prepared financial statement with a letter from the Executive Director and the Board Chair affirming that it is accurate and fairly represents the financial status of the Agency. In addition, the agency may be asked to provide copies of the check register and monthly bank statements;
 - b) \$15,001--\$50,000: Compilation;
 - c) \$50,001--\$300,000: Review;
 - d) \$300,001 or Higher: Audit.