



Matagorda County United Way

POLICY STATEMENT

Matagorda County United Way will consider funding applications from non-profit organizations that meet the following criteria.

The non-profit must:

- Provide cost-effective delivery of high-priority programs and services that provide human care in the areas of health, education, and/or creation of financial stability in Matagorda and/or Wharton counties
- Demonstrate sound financial and administrative management practices
- Be a 501 (c)(3) tax exempt organization
- Have a “Mission Statement”
- Comply with all applicable laws
- Provide an annual audit if the budget is \$100,000 or more; or a review with outside certification at least once every year, if the budget is less than \$100,000 but more than \$20,000.
- Show that service(s) are not primarily for the benefit of any church or synagogue, or for sectarian religious purposes
- Show that service(s) are not political in nature
- Demonstrate that service(s) are made available to all in the target population regardless of ability to pay when applicable.
- Show management and general administration expenses are less than 25% of the organization’s expenses as verified by the financial statement, the audit and the 990
- Demonstrate community and financial support from sources other than the United Way
- Demonstrate impact through measurable outcomes - in other words, get results



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EVALUATION CRITERIA

In reviewing applications, Matagorda County United Way will take into account:

- **Community Need** -- Does the program address a recognized health and/or human service need in our community? Is the need consistent with the MCUW mission? How serious is the problem? Are other organizations in the community addressing this need?
- **Impact** – How well does the program demonstrate a meaningful link between community needs, program activities and outcomes? Will the program provide a meaning volume of services and/or people served? Will United Way funding make a difference?
- **Ability and Evaluation** – Does the organization have a history of reliability? Are there adequate staff (paid and/or volunteer) and resources to conduct this program? Does the program plan seem sound? Are clear goals and objectives outlined? Are measurable outcomes evident? How well does the organization demonstrate the ability to deliver and measure proposed outcomes of the program?
- **Financial Management** – Is the financial information presented clearly and accurately? Does the organization have a balanced budget? Does the organization have adequate reserves? Is there diversified funding? Is other funding available? Are overhead expenses a reasonable percentage of total expenses?
- **Track Records** (not applicable for first year applicants) -- Is there year round commitment to work in partnership with the United Way? Did the organization accomplish its goals and objective last year? Did the organization make a difference with last year's United Way funds?





Anti-Terrorism Compliance Measures

In compliance with the USA PATRIOT Act and other counterterrorism laws, the *Matagorda County United Way* requires that each agency certify the following:

“I hereby certify on behalf of _____ (*name of grantee*) that all United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes and executive orders.”

Print Name: _____ Title: _____

Signature: _____ Date: _____

Agency mailing information (for receipt of funds)

Agency Name _____

Address _____

City _____ State _____ Zip _____

Agency contact information

Name _____

Phone _____

Email _____