



of the Lewis and Clark Area

75 East Lyndale
Helena, MT 59601
406-442-4360
www.unitedway.org

2024 United Way of the Lewis and Clark Area New Partner Application

ABOUT THE UWLCA PARTNER AGENCY NETWORK

Uniting resources, organizations, and people to transform our community for good.

UWLCA partner agencies value collaboration and actively seek ways to work together to avoid the duplication of services and achieve maximum effectiveness for our area programs.

UWLCA partners:

- Are eligible to receive donor-designated funds through the annual community-wide charitable giving campaign. These funds are unrestricted.
- Are eligible to apply annually for Community Impact Grants from UWLCA (when available).
- Are included in the UWLCA federation in the State of Montana Employee Charitable Giving Campaign (SECGC). UWLCA pays all applicable SECGC fees for our partner agencies and no fundraising or administrative costs are withheld by UWLCA.
- Are eligible for Global Corporate Leader (GCL) company campaigns through Costco, Target, US Bank, Wells Fargo, etc. These organizations may send checks directly to the partner or to UWLCA through a third-party vendor (Truist, Benevity, YourCause, etc.)

At the end of each campaign year (generally January) UWLCA will provide its partner agencies with a report showing all designated dollars with donor information if the donors have chosen to release their information. UWLCA will pay out money received towards these designations quarterly. The following table provides you with dates that you will receive your funds if donors designate to your organization. UWLCA recommends partners budget a rate of 4-6% uncollectible from the total pledged amount to adjust for people retiring and/or otherwise leaving the workplace who do not fulfill their full pledge.

Donor Choice United Way Campaign	State Employee Charitable Giving Campaign
April: All Cash/Credit Card and Payroll Deduction Collected	May: All Cash/Credit Card and Payroll Deduction Collected
July: Payroll Deduction Collected	August: Payroll Deduction Collected
October: Payroll Deduction Collected	November: Payroll Deduction Collected
January: Payroll Deduction Collected	March: Payroll Deduction Collected

PERIOD OF PARTNERSHIP

This partnership is ongoing from July 2024 – June 2025 until either United Way or the partner agency chooses to terminate this agreement.

ELIGIBLE APPLICANTS

Eligible applicants include 501(c)3 nonprofit organizations in good standing with the IRS that have an established oversight board. Entities must operate programs and/or deliver services in Lewis and Clark, Jefferson, and/or Broadwater counties. Organizational activities must align with the UWLCA mission and focus areas of equity, health, education, financial stability, and/or basic needs.

DIVERSITY EQUITY INCLUSIVITY STATEMENT

At the United Way of Lewis & Clark Area we recognize racism, discrimination and oppression have contributed to disparities that have existed in the past and persist in the present across our nation and in Montana. We acknowledge those inequities are the result of policies and practices that work to

marginalize entire populations of people. We denounce discrimination in all its forms because it undermines the well-being and vitality of our communities. Our United Way Network seeks to dismantle disparities. We strive to engage residents and community members, especially those whose voices have traditionally been marginalized, in the shared work of building equity and empowerment. We work with public and private partners to co-create solutions that ensure everyone has the resources, support, and opportunities they need to thrive. We believe that diversity drives creativity and innovation, therefore we commit to leveraging all of our assets to create more equitable communities. We know that having varied perspectives helps generate better ideas to solve the complex problems of an ever-changing and increasingly diverse world.

ELIGIBLE USE OF FUNDS

Donor designated funds must be expended to serve people in Lewis and Clark, Broadwater, and/or Jefferson counties, but are otherwise unrestricted. Community Impact Grant funds are restricted according to the purpose identified in the grant application.

SUBMISSION DEADLINE

Applications are accepted any time throughout the years. Applicants must submit an electronic version (Word doc or pdf) via email to info@unitedwaylca.org.

QUESTIONS?

info@unitedwaylca.org or by phone at 406-442-4360.



2024 United Way New Agency Application

Part 1: Agency Information

1. Agency Name:
2. Mailing Address:
3. Physical Address:
4. City:
5. State:
6. Zip Code:
7. Tax ID (EIN):
8. Website:
9. Facebook: Yes No
10. Executive Director Name:
11. Executive Director Email:
12. Executive Director Phone:
13. SECGC Contact:
14. SECGC Contact Email:
15. SECGC Contact Phone:
16. Description of Services (**25 words or less**-SECGC only allows 25 words)

17. Service Region

I certify that the organization named in this application provides health, education, financial stability, and/or basic needs services in the following counties:

Lewis and Clark Broadwater Jefferson

18. IRS Determination Letter

I certify that the Internal Revenue Service recognized the organization named in this application as tax-exempt under 26 U.S.C. 501(c)(3)

19. Fiscal Capacity and Finances (see requirements on page seven).

Did your most recent audit or audit review receive a clean opinion? Yes No

Do you have one person on your board with financial expertise? Yes No

Does your organization maintain a responsible and representative governing board of directors, who serve without compensation, exercise best practices to assure effective administrative control, and meet at least quarterly? Yes No

I certify that the organization named in this application completed and submitted a signed IRS Form 990 for the year ending on or after June 30, 2023.

Part 2: Governance & Organizational Capacity

1. Is your agency all volunteer-run? Yes No
2. Is your agency governed by a volunteer policy-making board of directors? Yes No
3. How often does the board meet?
4. Does your agency keep attendance records and minutes of board meetings? Yes No
5. Does your Board of Directors make decisions regarding Executive Director compensation?
Yes No

If not, why not?

6. Do 100% of Board members donate financially to the organization? Yes No
7. Does your agency have a system for the rotation of board members? Yes No

If not, why not?

8. Does your board participate in regular board training? Yes No

If not, why not?

9. Does your organization present a prepared financial report at Board meetings on at least a quarterly basis? Yes No

10. **Board of Directors:** Please list officers, board members, positions, and city of residence. Please attach on separate piece of paper if more room is needed.

Board Member Name

Position

City of Residence

Part 3: Most Recently Approve Financial Statements (Please attach)

Part 4: Fiscal Capacity and Finances

1. Please attach your most recent IRS Form 990 (required for all applicants).
2. Did agency's gross revenue exceed \$100,000 in your most recent 990? Yes No

In what year was your most recent IRS Form 990 filed?

3. Has your agency completed an independent audit (if your revenue exceeded \$500,000) or audit review (if revenue was between \$100,000 - \$249,999)? Yes No

If not, why not?

4. Is your most recent audit available online? Yes No
5. What was your agency's 2023 total operating budget? \$
6. What is the balance of your agency's reserve funds? \$
7. If your agency has reserve funds, what portion is set aside and designated by your board for a specific purpose? % or \$

Part 5: Activities and Impact

1. Why do you want to become a United Way of the Lewis and Clark Area partner (**in 500 words or less**)?
2. Please describe what your agency does, including the services and programs provided, **in 500 words or less**.
3. What unmet community needs does your organization provide?
4. Do other agencies and/or groups currently provide similar services to those provided by your organization? Yes No

If yes, please describe why it is important that multiple agencies and/or groups currently do the work? *For example, ABC organization provides winter coats for kids in East Helena and Helena, and our organization provides coats for kids in Townsend and Boulder.*

If yes, please discuss how you work with these other agencies and/or groups to further your mission and provide effective services for your shared clients.

5. Please share an agency success story. This will help us communicate the impact of the work that you do. If an individual's real name is used, please also include a signed release. The story should be clear and concise.
6. Additional comments and information?

Attachment 1
2024 Partner Agency Funding Application
Statement of Agreement
Between
United Way of the Lewis & Clark Area (UWLCA)
and
(Agency Name) _____

The parties in this Agreement believe that consolidated fundraising is an effective way to raise community dollars for human services and that the community's interest is best served by working together to develop and maintain a system of effective, efficient and needed human services.

United Way agrees to:

<input checked="" type="checkbox"/>	Maintain status as 501(c)(3) or public tax-exempt, nonprofit organization in compliance with federal, state and local laws as well as current registration with the Montana Secretary of State.
<input checked="" type="checkbox"/>	Maintain a responsible and representative governing board of directors, who serve without compensation, exercise best practices to assure effective administrative control, and meet at least quarterly.
<input checked="" type="checkbox"/>	Prohibit the sale or lease of contributor lists.
<input checked="" type="checkbox"/>	Conduct publicity and promotional activities based upon its actual programs or operations.
<input checked="" type="checkbox"/>	Effectively use the funds contributed by corporate workplace donors.
<input checked="" type="checkbox"/>	Elect at least one board member with a strong financial background.
<input checked="" type="checkbox"/>	Represent the duties of the Board treasurer in its bylaws.
<input checked="" type="checkbox"/>	Present a prepared financial report at Board meetings on at least a quarterly basis.
<input checked="" type="checkbox"/>	Conduct an annual independent audit.
<input checked="" type="checkbox"/>	Forbid the use of illegal drugs and/or the illegal use of legal drugs in its programs and on your property.
<input checked="" type="checkbox"/>	Conduct an annual area-wide fundraising campaign.
<input checked="" type="checkbox"/>	Generate community support for the campaign through effective communications and marketing.
<input checked="" type="checkbox"/>	Publicly promote and point out the accomplishments of partner agencies as appropriate.
<input checked="" type="checkbox"/>	Respect the participating agency's autonomy and right to determine its own programs.
<input checked="" type="checkbox"/>	Operate without discrimination and carry out affirmative programs to assure equal employment opportunity. This policy applies to persons served by the agencies, to the staff of the agencies, and to membership on their governing boards. Operating without discrimination means: <ul style="list-style-type: none"> a. No person is excluded from service because of race, ethnic origin, religion, or sex. b. There is no discrimination on the basis of race, ethnic origin, religion, or sex in hiring, assignment promotion, or other conditions of staff employment or in membership on the agency's governing board. c. The agency is undertaking positive action to achieve equal employment opportunities for all persons.

The Agency agrees to (please check boxes):

<input type="checkbox"/>	Maintain status as 501(c)(3) or public tax-exempt, nonprofit organization in compliance with federal, state and local laws as well as current registration with the Montana Secretary of State.
<input type="checkbox"/>	Maintain a responsible and representative governing board of directors, who serve without compensation, exercise best practices to assure effective administrative control, and meet at least quarterly.
<input type="checkbox"/>	Prohibit the sale or lease of contributor lists.
<input type="checkbox"/>	Conduct publicity and promotional activities based upon its actual programs or operations.
<input type="checkbox"/>	Effectively use the funds contributed by corporate workplace donors.
<input type="checkbox"/>	Elect at least one board member with a strong financial background.
<input type="checkbox"/>	Represent the duties of the Board treasurer in its bylaws.
<input type="checkbox"/>	Present a prepared financial report at Board meetings on at least a quarterly basis.
<input type="checkbox"/>	The agency with an annual budget of \$500,000 or more has an independent audit; agencies with an annual budget of \$250,000-\$499,000 has a review completed by a certified public accountant or in the case of agencies with budgets of \$100,000-\$249,000 a compilation conducted annually by a certified public accountant, agencies with a budget of \$0-\$100,000 complete internal financial statements.
<input type="checkbox"/>	Forbid the use of illegal drugs and/or the illegal use of legal drugs in its programs and property.
<input type="checkbox"/>	Coordinate and give support to the UWLCA throughout the year and during the annual campaign through volunteer and professional leadership.
<input type="checkbox"/>	Recognize UWLCA's financial support by, for example, using the UWLCA logo according to guidelines, hanging window clings, using tabletop signs at events, placing the logo on your website and in annual reports.
<input type="checkbox"/>	Operate without discrimination and carry out affirmative programs to assure equal employment opportunity. This policy applies to persons served by the agencies, to the staff of the agencies, and to membership on their governing boards. Operating without discrimination means: <ul style="list-style-type: none"> a. No person is excluded from service because of race, ethnic origin, religion, or sex. b. There is no discrimination on the basis of race, ethnic origin, religion, or sex in hiring, assignment promotion, or other conditions of staff employment or in membership on the agency's governing board. c. The agency is undertaking positive action to achieve equal employment opportunities for all persons.

The undersigned certify that the above conditions have been met.

United Way Executive Director Signature

Date

United Way Board Chair Signature

Date

Partner Agency Executive Director Signature

Date

Attachment 2
2024 New Partner Agency Application
VolunteerHelena.org Agreement

The United Way of the Lewis and Clark Area agrees to:

- Advertise the agency needs for volunteers via www.volunteerhelena.org. The website will be advertised in the local newspaper, radio, TV, Internet, and newsletters.

The Agency agrees to:

- Update the website with a current agency profile and ongoing with volunteer opportunities.
- Assure adequate health and safety provisions for the protection of the volunteer.
- Screen and review volunteer background as appropriate.
- Provide volunteer with orientation, instruction, supervision and recognition.
- Agency will comply with provisions of Title VI of the Civil Rights Act of 1964 and will act in accordance with the American Disabilities Act.

I understand that www.VolunteerHelena.org refers prospective volunteers; however my agency is ultimately responsible for screening, interviewing, accepting and training the volunteer. I understand that VolunteerHelena.org is a referral source only. The agency agrees to release, indemnify, and hold harmless the www.VolunteerHelena.org and/or United Way of the Lewis & Clark Area from any liability or claim of liability of any nature whatsoever, resulting from the referral of, or the use of referred volunteers.

Agency Executive Director Signature

Date

Attachment 3

2024 Counterterrorism Compliance

Organization Name _____

In compliance with the spirit and intent of the USA PATRIOT Act and other counterterrorism laws, the United Way of the Lewis & Clark Area requests that each funded agency (“Organization”) certify that it is in compliance with the United Way of the Lewis & Clark Area and the United Way of America’s (“UWLCAA”) compliance program.

Check the Appropriate Box to Indicate Your Compliance With Each of the Following:	Comply	Do Not Comply
This Organization is not on any federal terrorism “watch lists,” including the list in Executive Order 13224, the master list of specially designated nationals and blocked persons maintained by the Treasury Department, www.treas.gov/offices/enforcement/ofac/sdn/ and the list of Foreign Terrorist Organizations maintained by the State Department, www.state.gov/s/cf/4291.htm .	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not, will not and has not knowingly provided financial, technical, in-kind or other material support or resources* to any individual or entity that is a terrorist or terrorist organization, or that supports or funds terrorism.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not, will not and has not knowingly provided or collected funds or provided material support or resources (*) with the intention that such funds or material support or resources be used to carry out acts of terrorism.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not, will not and has not knowingly provided financial or material support or resources to any entity that has knowingly concealed the source of funds used to carry out terrorism or to support Foreign Terrorist Organizations.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not re-grant to organizations, individuals, programs and /or projects outside of the United States of America without compliance with IRS guidelines.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization takes reasonable, affirmative steps to ensure that any funds or resources distributed or processed to not fund terrorism or terrorist organizations.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization takes reasonable steps to certify against fraud with respect to the provision of financial, technical, in-kind or other material support or resources to terrorists and terrorist organizations.	<input type="checkbox"/>	<input type="checkbox"/>

* In this form, “material support and resources” means currency or monetary instruments or financial securities, financial services, lodging, training, expert advice, or assistance, safehouses, false documentation or identification, communications equipment, facilities, weapons, lethal substances, explosives, personnel, transportation, and other physical assets, except medicine or religious materials.

I certify on behalf of the Organization listed above that the foregoing is true.

Print Name: _____ Title: _____

Signature: _____ Date: _____