

United Way of Lee County

Program Funding Agency Criteria

- Agency must have a 501 (c) (3) status
- Focus of the agency must be human service oriented:
 - Health & Basic Needs
 - Education focused on children & success in school
 - Financial Stability & Homelessness
 - Youth Development & Community Enrichment
- Agency programs must serve and benefit the people of the Lee County Community.
- Agency must have an active, unpaid governing Board of Directors with regular meetings (at least quarterly). By-laws must be available for review if requested. Please upload a current Board of Directors Roster with two signatures (one from preparer and one from board officer/member).
- Board must be locally or regionally based. If a regional agency; one or more Directors from the Lee County community must be included with good faith commitment to recruit such Directors if not in place at the time of the funding request.
- Please upload a recent Audit, IRS Form 990 or the equivalent and also upload the most recent fiscal year ended Agency **Program** Budget, Statement of Financial Activities/Position (balance sheet) and Statement of Income & Expenses.
 - Note: Under the circumstance of a newly formed agency, please provide a letter of commitment to submit an Audit or IRS Form 990 for the current funding year and to comply with the State Requirements for a Charitable Audit.
- New agencies must provide the IRS determination letter of exemption.
- Agency must abide by all current United Way policies, including fundraising campaign policies. United Way of Lee County annual agency grant program funding requests can not include grant writing fees.

NOTE: Exceptions to any of the above criteria must be reviewed by the United Way of Lee County Board of Directors.