

Stewardship Review Process

Organizations must submit a Stewardship Packet for review to determine eligibility for funding.

NOTE: New organizations seeking funding should schedule a pre-application session with United Way staff and send a letter of intent to United Way, indicating which focus area they are addressing, outlining the community program or service they hope to provide, and the funding amount they intend to apply for. United Way staff and board review requests and make a decision on whether to allow program to advance forward.

Stewardship Packet Checklist

A complete Stewardship Packet will contain the following elements:

Financial Review Checklist	
<input type="checkbox"/>	Audit: If the nonprofit's annual revenue is \$100,000 or greater, provide audited financial statements for most recently completed fiscal year (depending upon your fiscal year end). Please share unaudited financials if audited statements are not yet available.
<input type="checkbox"/>	Board Roster: Most current roster of the Board of Directors indicating those who are officers, members of the Executive Committee and all standing committees. Please acknowledge that at least three of the members have no material conflict of interest and a majority of whom serve without compensation, which directs the organization.
<input type="checkbox"/>	Budget: Most current Board approved budget with comparison to previous year and current year to date actual revenue and expenditures.
<input type="checkbox"/>	IRS Determination Letter: Most recent 501(c)(3) designation letter.
<input type="checkbox"/>	Form 990 or 990EZ for the most recently completed (depending upon your fiscal year end).
<input type="checkbox"/>	Management Letter: If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of the management letter and your service provider's formal response.
<input type="checkbox"/>	Unaudited Financial Statement: Most recent financial statements, should include Statement of Financial position (Balance Sheet) and Statement of Activities (Income Statement).
<input type="checkbox"/>	Patriot Act Compliance: In compliance with the USA PATRIOT ACT and other counter-terrorism laws, United Way requires that each agency certify United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statues and executive orders.
<input type="checkbox"/>	Disclosures: Please list any major changes and/or circumstances, fraud, litigation, investigation or other related occurrences sine the most recent audit that would affect the financial health of your organization. If there are not any disclosures, please indicate such when completing application.
<input type="checkbox"/>	Required Licenses and Accreditations: If applicable, provide type, licensing body and renewal date.
<input type="checkbox"/>	Regional, State or National Affiliations: If applicable, provide membership documentation.