

**ELIGIBILITY STANDARDS FOR INITIAL AND SUSTAINED MEMBERSHIP  
IN THE UNITED WAY SYSTEM**

**United Way of America Bylaws, Article VI, Section 1 (a)-(m), as amended January 2003**

	To become a member or remain a member in good standing, each organization or member will certify annually that they meet the basic criteria for membership. Each member will:
a	Be recognized as exempt from taxation under Section 501(c)(3) of the Internal Revenue Code as well as from corresponding provisions of other applicable state, local or foreign laws or regulations and files IRS Form 990 annually in a timely manner  Annually, all Metro 1 and 2 members will submit their entire IRS Form 990 to United Way of America.
b	Comply with all other applicable legal local, state, and federal operating and reporting requirements (e.g. nondiscrimination).
c	Have an active, responsible, and voluntary governing body, which ensures effective governance over the policies and financial resources of the organization.
d	Adhere to a locally developed and adopted statement to ensure volunteers and staff broadly reflect the diversity of the community it serves.
e	Represent itself as a United Way in accordance with all United Way of America trademark standards and requirements, including those contained in the licensing agreement.
f	Provide financial support to United Way of America in accordance with the agreed upon membership investment formula.
g	Adhere to a locally developed and adopted code of ethics for volunteers and staff, which includes provisions for ethical management, publicity, fundraising practices and full and fair disclosure.  All Metro 1 and 2 members will submit a copy of their current code of ethics to United Way of America.
h	Have an annual audit conducted by an independent certified public accountant whose examination complies with generally accepted auditing standards and GAAP. Organizations with annual revenue totaling less than \$100,000 may have their financial statements reviewed by an independent accountant.  Annually, All Metro 1 and 2 members will submit audited financial statements to United Way of America.
i	Conduct and submit to United Way of America every three years a volunteer led self-assessment of their community impact work, financial management, and organizational governance and decision making.
j	Annually submit Database II Survey and Amounts Raised Card to United Way of America.
k	Biennially submit Income and Expense Survey to United Way of America.
l	Adhere to standard reporting guidelines contained in Database II Survey for reporting campaign revenue and resources generated to United Way of America.
m	Adhere to the following cost deduction standards on designations (agency transactions): a) fees charged will be based on actual expenses b) will not deduct fundraising or processing fees from designated gifts originating by or from another United Way organization.