

United Way Worldwide Membership Criteria

- Be tax-exempt under Section 501(c)(3) of the Internal Revenue Code as well as corresponding provisions of other applicable state, local or foreign laws or regulations
- Annually file IRS Form 990 according to UWW instructions and guidelines to ensure consistent reporting among United Ways
- Comply with all other applicable legal local, state, and federal operating and reporting requirements (e.g., nondiscrimination, Sarbanes-Oxley Act, USA Patriot Act).
- Have an active, responsible and voluntary governing body, which ensures effective governance over the policies and financial resources of the organization.
- Adhere to a locally developed and adopted statement to ensure volunteers and staff broadly reflects the diversity of the community it serves.
- Support the United Way system by providing financial support to United Way Worldwide according to the membership investment formula.
- Adhere to a locally developed and adopted code of ethics for volunteers and staff which include provisions for ethical management, publicity, fundraising practices and full and fair disclosure.
- Undergo an annual audit conducted by an independent certified public accountant whose examination complies with generally accepted auditing standards and GAAP.
- Conduct every three years a volunteer-led self-assessment of its community impact work, financial management, and organizational governance and decision making.
- Annually submit to United Way Worldwide a report of the total resources generated (annual fundraising campaign plus other resources such as in-kind donations and proceeds from special events). This report must be completed according to a policy that ensures an accurate, unduplicated national accounting for the United Way system.
- Submit to United Way Worldwide a bi-annual income and expenses survey.
- If managing donor-designated gifts, base any fee charged on actual expenses. If receiving designated gifts from another United Way organization, not deduct fundraising or processing fees.