

United Way of Greater Nashville's Agency Eligibility Review Process

United Way of Greater Nashville is opening the Community Impact Funding application process that starts October 1, 2024. Any agency or organization applying for funding from United Way of Greater Nashville must have a **GivingMatters.com profile**. This profile must be current and up to date to be considered for funding. If you have not established a profile, please go to <https://givingmatters.civicore.com/requestProfile>. To update your profile, log in and follow the instructions. **Please do this part of the process now!**

Any agency interested in applying for funding **must complete the Agency Eligibility Review (AER) Process** and be approved for consideration. The AER process will open on October 1, 2024, and will close on October 25, 2024. **If you do not complete this process by October 25, you will NOT be eligible to apply for funding with UWGN until the next process in two years.**

The AER process includes an up-to-date Givingmatters.com profile with all below information uploaded, submission of the AER Checklist through survey monkey (link will be sent October 1, 2024), a review by UWGN staff, and review by AER Committee Members in auditing and accounting. If a committee member has a question or concern, they will reach out to the organization contact listed on our communications.

To be considered for funding an agency must meet ALL following requirements:

- Demonstrate that the agency has a significant local presence in one or more of UWGN's 9-county footprint and that its activities benefit residents of these counties: **Cheatham, Davidson, Dickson, Hickman, Houston, Montgomery, Robertson, Stewart, and/or Williamson.**
- Be focused on health and human services, specifically supporting outcomes in education, economic or financial mobility, health or basic needs (reference the UWGN Outcomes Framework).
- Have a determination from the IRS with 501(c) status established prior to 4/1/2022.
- Provide service to those whose household income is considered low to moderate.
- Maintain an updated 211 Profile with a listing of your services and any requirements to receive services to ensure the community has access to your agency.

Any 501(c)3 agency wishing to receive funding from United Way of Greater Nashville must upload the documents listed below in Givingmatters.com before October 25:

- Documentation of incorporation and exemption from Federal Income Tax under Section 501(c) of the Internal Revenue Service Code.
- Current Board of Directors listing. Contact information for the board chair must include name, e-mail address, employer, and term of service.
- Document the number of times your full board meets per year. This is located under the Governance> Basic Info tab.
- Most recently filed IRS Form 990, 990EZ, and any 990T if filed (this should cover calendar year 2023 or fiscal year 2022/23) or a 990 Exemption Letter. The 990 must be signed by the agency or the agency may not be given further consideration. If an agency has applied for

an IRS 990 extension, it should submit its extension letter. In such case, it will be required to submit its filed 990 to UWGN no later than April 1, 2025.

- Current State of Tennessee charitable solicitations letter (or waiver letter, as applicable). A copy of a current permit will be required for the contracting process.

Updated Financial Requirements: An annual independent audit is required for all agencies with gross revenues greater than \$1,000,000. For agencies with gross revenues from \$300,000-\$999,999 a certified financial review for the most recent year-end is required. This must cover calendar year 2023 or fiscal year 2022-2023. The audit and/or financial review must be signed by the financial firm and be on firm letterhead or the agency may not be given further consideration. A financial compilation is not acceptable. If the audit firm issued a management report as a result of the audit that identifies significant deficiencies or material weaknesses in internal controls, please attach a copy of that report. If an agency's audit is not complete due to filing an IRS 990 extension letter, UWGN will grant an extension, and the agency will need to submit its audit to UWGN no later than April 1, 2025.

For agencies with annual revenue below \$300,000, a financial professional (volunteer or paid) must review the agency's financials and provide documented notes of review and validation of all financials. This must cover calendar year 2023 or fiscal year 2022-2023.

All 501(c)3 agencies are eligible for inclusion in GivingMatters.com and will be required to have a **current and up to date GivingMatters.com profile with all the above documents available for review**. None of the above documents will be submitted directly to UWGN.

To promote community problem-solving collaborations, UWGN may elect to financially support programs of other non-profit organizations such as public and quasi-public sector organizations that provide legitimate educational, health, financial stability or human services programs with an alternative 501(c) designation. **All other 501(c) organizations must submit all the above documents to UWGN prior to October 25, 2024.** This should be a zip file emailed to tracey.dill@unitedwaygn.org.

Training Dates for Funding:

- Community Impact Funding process and Outcomes Framework
 - September 30 from 9:00am to 10:00am CST.
 - <https://us06web.zoom.us/j/85381323042?pwd=xanBWJGVmAbY6q6m9UubmKMG4YQUMN.1>
- Agency Eligibility Review Process FAQ Session
 - October 7, 1:00pm-1:30pm CST
 - <https://us06web.zoom.us/j/82038571437?pwd=OdwoeZUpri6kbaTbWBqtbA7a07n66L.1>
- UWGN Application Overview and Outcome Framework Training
 - October 30, 9:00am – 10:00am
 - <https://us06web.zoom.us/j/84349948308?pwd=S1pFhX4lOdNseFBxtFKtFEaTLmcGjY.1>

Any questions, comments or concerns can be directed to tracey.dill@unitedwaygn.org. Thank you for your interest in a UWGN partnership!