

## Community Building & Impact Department Minimum Eligibility Requirements for United Way Silicon Valley Funding

### **Agency must meet the minimum RFP criteria:**

- Independent 501 (c) (3) organization providing direct health and human services in Santa Clara County for three (3) or more years.
- Agency must request funds for an existing program(s) that align with our strategies of Stability and/or Self-Sufficiency
- Agency must have a Board approved (current fiscal year) annual operations budget of \$350,000 or more
- For those agencies seeking funds under the areas of Building Adult Living Skills and Broadening Leadership Capacity, applicant must be able to demonstrate that the majority of the agency's proposed program service demographic population resides in the United Way Silicon Valley's identified "high need" zip code area (For those agencies seeking funding under other focus areas, there is no geographic requirement)
- Agency must be able to provide current audited financial statement (last completed fiscal year), completed by an independent auditor for most recently completed fiscal year
- Agency must be willing to complete and sign the Patriot Act Compliance Form required by United Way Worldwide
- Agency must be willing to sign and adhere to United Way Silicon Valley Statement of Non-Discrimination

### **RFP application requires the following documents:**

- Copy of IRS tax exemption letter
- List of Board of Directors
- Current Agency Budget with projected income and expenses
- Last completed fiscal year's audited financial statements (by an independent auditor)
- Most recent IRS 990
- Patriot Act Compliance Form
- Annual Report or Brochure
- Current Strategic Plan, spans from 3 to 5 years, includes the agency's mission statement, outlines long-term goals with annual objectives, is a result of input from agency Board & Staff
- Affirmative Action Plan Policy or statement of non-discrimination policy
- Proof of adequate insurance coverage including liability insurance, bonding of staff/volunteers and property