



United Way of
Waco-McLennan County

Grant Eligibility Criteria 2025-27

Organizational Criteria

Basic Eligibility Requirements:

- 501(c)3 Organization, except:
 - ISDs and ISD Foundations
 - Universities, Colleges and their Foundations
- UW Funding Request = 50% or less of total organizational budget
- McLennan County Service area
- Mission Statement

Board Criteria

Basic Eligibility Requirements:

- Formal Board Structure
- Board Tenure Limits & Rotation Plan
- Fiscal Responsibility of Board (Budget & Review)
- Annual Review of ED/CEO
- Organizational / Board Bylaws
- Meets 4x/ year + at quorum

Program Criteria

Basic Eligibility Requirements:

- Program/Activities Description
- United Way Impact Framework Pillar/Goal/Strategy Alignment

Documentation



United Way of
Waco-McLennan County

Basic Eligibility Requirements:

- IRS - 501(c) 3 Letter*
- Audit or Reviewed Financial Statements (by \$ size bracket of organization – see next page)*
- IRS 990*
- Board of Directors List
- Certificate of General Liability Insurance
- Organizational/Board Bylaws
- Policy of Non-Discrimination of Services to Clients (or serving a Traditionally Underserved Target Population)
- Organizational Budget (*Current FY, budget-to-actual*)

***Required Upload for Eligibility Checklist Package**

All other documents subject to United Way request at any time. Must indicate that your org has all of the required documents on file.

Required Financial Documents By Org \$ Size

Financial Statements (min level)	<i>Org Annual Revenue</i>
<ul style="list-style-type: none"> <i>Audit</i> 	\$1,000,000 +
<ul style="list-style-type: none"> <i>Independent Financial Review (CPA/Accounting Firm)</i> <i>If not included in CPA/Firm's review, <u>please also attach</u> a Board Statement detailing:</i> <ul style="list-style-type: none"> <i>Internal controls in place at the organization, particularly to monitor cash</i> <i>The process for monitoring financial statements and budget for organization</i> <i>If any CPAs currently serve on the Board</i> 	\$500,000 - \$999,000
<ul style="list-style-type: none"> <i>Board-Approved Financial Statements</i> <i>(Prior FY Balance Sheet & Income Statement minimum)</i> <i><u>Include Board Narrative / Minutes approving annual financials and detailing:</u></i> <ul style="list-style-type: none"> <i>Internal controls in place at the organization, particularly to monitor cash</i> <i>The process for monitoring financial statements and budget for organization</i> <i>If any CPAs currently serve on the Board</i> 	\$499,999 and below

Grants – General Parameters



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Question	Answer
Total United Way \$ available for all Grants?	<i>(Campaign Contingent)</i>
What is the funding cycle length?	<i>2 Years (24 months)</i>
Are grants renewable?	No, but may re-apply in following cycle; competitive process
What is reporting cycle?	Every 6 months (4 reports total)
How many program are submissions allowed?	Up to 2 programs

Grants – General Parameters



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Question	Answer
What is not funded?	<ul style="list-style-type: none">• Capital Campaigns• Debt Service• Endowments• Fundraising Events• Programs not aligned with Impact Framework• No significant building renovations• No Large Capital Purchases (e.g. vehicles) (maximum 10% of grant award, up to a maximum \$7,500 per organization)• New “seed” program of <u>new</u> organization (no history)• Short-term initiatives < 1 year• Materials or training only

Grants – General Parameters



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Question	Answer
Max request & award \$ per Organization?	\$150K max Combined Total per Organization <i>Exception: \$100K max for Organizations submitting programs under Safety Net Services goal area <u>only</u> (1 or 2 programs)</i>
Max request & award \$ per Program?	There is no program grant request/award maximum
Min request & award \$ per Organization?	\$25,000
Can a portion be for General Operating?	Yes – up to 25% of grant
United Way Program \$ request amount:	Must be 50% or less of total Program Budget