



Guide for Non-profits

To qualify for funding non-profits must meet the following guidelines.

Regulatory Requirements

1. A non-profit and exempt from taxation under Section 501(c)3
2. Provide services for a recognized human need in one of the fields below:
 - a. **Youth opportunity**- Helping young people achieve their potential
 - b. **Healthy community**- Promoting healthy lifestyles and access to health
 - c. **Financial security**- Helping people achieve financial stability
 - d. **Community Resilience**- Addressing urgent needs today for a better tomorrow
3. Provide services to residents of Davidson County, North Carolina
4. Hold a valid solicitation license or be exempted by the NC Secretary of State's office
5. Been an established 501(c)3 nonprofit organization **1 year** or longer
6. Have evidence-based programming with **1 year** of solid evaluated results

Requirements of the Board

1. Volunteer based and representation in service area
2. At least 8 active non-relative members that have term limits set by Agency's bylaws
3. Have quarterly meetings and exercise effective control over the Agency

Use of UW Funding

1. Request for funding should only be for programs.
2. If you are applying for multiple programs, please complete an application for each program.
3. UW Funding must be used in a 12-month period.

Required Training (for new nonprofits and/or returning nonprofits with new leadership)

1. July 16, 2026- virtual

Required Meeting (for returning non-profits)

2. July 17, 2026, 9-10:30am (in person) Hospice of Davidson County

Required Meeting(New Nonprofits & New Executive Directors of Returning Agencies)



Letter of Intent Requirements- Due August 7, 2026, <https://www.uwdavidson.org/LOI>

1. Program Information
 - a. Program Name and Description
2. Organizational Information
 - a. Tax ID, Mission Statement, etc
 - b. **Upload-** Form 990, Agency's Bylaws, 501(c)3
3. Legal Information
 - a. **Upload-** Solicitation License
4. Financial Information- **Upload-** Recent Financials based on guide below
 - < \$100,000 – **Internally prepared Balance Sheet and Income Statement** and prior two years **Forms 990** prepared by a non-employee, external CPA
 - \$100,000 - \$400,000 – **Compiled financial statements** with footnotes prepared on GAAP basis by an independent CPA
 - \$400,001 - \$750,000- **Reviewed financial statements** with footnotes prepared on GAAP basis by an independent CPA including a **periodic review of internal controls** (every 3 years or when there is a change in executive director)
 - > \$750,000 – **Audited financial statements** prepared on a GAAP basis by an independent CPA including a **SAS 115 Audit Letter** (Communicating Internal Control Related Matters Identified in an Audit)
5. Governance
 - a. **Upload-** Board of Directors Listing
6. Fundraising
 - a. **Upload-** Fundraising Calendar
7. Terms of Agreement
 - a. **Upload** or electronically sign agreement with both Director and Chair Signature

You are finished!

A United Way Agency Advocate will contact you to let you know if you can move forward to the Application process.

Thank You!