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Form **990-EZ**Department of the Treasury
Internal Revenue Service**Short Form**
Return of Organization Exempt From Income TaxUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

► Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.

► The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-1150

2009**Open to Public
Inspection****A** For the 2009 calendar year, or tax year beginning

, 2009, and ending

, 20

B Check if applicable:

- ☐ Address change
☐ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

Please
use IRS
label or
print or
type.
See
Specific
Instruc-
tions.**C** Name of organization**UNITED WAY OF MAHASKA COUNTY**

Number and street (or P.O. box, if mail is not delivered to street address)

Room/suite

P.O. BOX 761

City or town, state or country, and ZIP + 4

OSKALOOSA, IA 52577-0761**D** Employer identification number**42-0869502****E** Telephone number**641-673-6043****F** Group Exemption

Number ►

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting Method: ☐ Cash ☒ Accrual
Other (specify) ►**I** Website: ► **WWW.UNITEDWAYMAHASKA.ORG****J** Tax-exempt status (check only one) — ☒ 501(c) (3) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**H** Check ☐ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).**K** Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$500,000 or more, file Form 990 instead of Form 990-EZ ► \$ **436,680****Part I** **Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	431,699
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	
	4	Investment income	4	2,001
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less: cost or other basis and sales expenses	5b	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>		
	6a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a	
6b	Less: direct expenses other than fundraising expenses	6b		
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c		
7a	Gross sales of inventory, less returns and allowances	7a		
7b	Less: cost of goods sold	7b		
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		
8	Other revenue (describe ► Pop Machine Proceeds, Miscellaneous)	8	2,980	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	436,680	
Expenses	10	Grants and similar amounts paid (attach schedule)	10	325,840
	11	Benefits paid to or for members	11	0
	12	Salaries, other compensation, and employee benefits	12	60,480
	13	Professional fees and other payments to independent contractors	13	3,750
	14	Occupancy, rent, utilities, and maintenance	14	803
	15	Printing, publications, postage, and shipping	15	4,862
	16	Other expenses (describe ► Supplies, Ins., Deprec., Marketing, Fundraising, Meetings, Misc)	16	54,281
	17	Total expenses. Add lines 10 through 16	17	450,016
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	(13,336)
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	445,506
	20	Other changes in net assets or fund balances (attach explanation)	20	0
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	432,170

Part II **Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	193,522	228,734
23 Land and buildings	0	0
24 Other assets (describe ► Receivables, Prepaid Expenses, Equipment)	302,666	294,283
25 Total assets	496,188	523,017
26 Total liabilities (describe ► Designations, Special Grants & Misc Payables)	50,682	90,847
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	445,506	432,170

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat. No 106421

Form **990-EZ** (2009)

SCANNED JUL 07 2010

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Part III Statement of Program Service Accomplishments (See the instructions for Part III.)

What is the organization's primary exempt purpose? **Fundraising for the Community**
 Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

Expenses
 (Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others.)

28	Provided support to XX community service organizations serving Mahaska County. Such agencies focus their efforts on children & youth, the poor & the elderly. Amount shown includes designated payments to affiliate agencies and other United Ways.		
(Grants \$	224,728) If this amount includes foreign grants, check here <input type="checkbox"/>	28a	224,728
29	Special Grants to XX community service organizations to provide basic needs assistance to low income families & youth or to fund programs that provide services to assist these individuals in budget counseling and referrals to assistance programs		
(Grants \$	73,049) If this amount includes foreign grants, check here <input type="checkbox"/>	29a	73,049
30			
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	30a	
31	Other program services (attach schedule)		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	31a	28,063
32	Total program service expenses (add lines 28a through 31a)	32	325,840

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.)

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
JILL E DURSKEY 462 N 9TH ST, OSKALOOSA, IA 52577	EXECUTIVE DIRECTOR	39,611	0	0
JULIE M HYLAND 171 HIGHLAND AVE, OSKALOOSA, IA 52577	ACCOUNTANT	13,335	0	0
AMY MCGRUFF P.O. BOX 503, NEW SHARON, IA 50207	PRESIDENT	0	0	0
DENNIS GIVENS 1 CARGILL DR, EDDYVILLE, IA 52553	VICE PRESIDENT	0	0	0
JACKY BRESNAHAN 1229 C AVE E, OSKALOOSA, IA 52577	SECRETARY	0	0	0
JON DENNISTON 902 SOUTH 2ND ST, OSKALOOSA, IA 52577	TREASURER	0	0	0
JEFF AKERS/STEVE HICKS 124 SOUTH 1ST ST, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
GLENDA BOOY 2172 230TH ST, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
MARK DEJONG/ MARK O'ROURKE 1710 3RD AVE E, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
CINDY JUNKINS 2214 SOUTH 11TH ST, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
TIM KURTZ 1901 A AVE WEST, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
DENNIS LICHTY 2505 SOUTH 35TH ST, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
CHRIS ROACH 110 HIGH AVE E, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
CHAD RODGERS/RICH SOURS 201 TRUEBLOOD AVE, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
NICK SMITH 100 1ST AVENUE W, OSKALOOSA, IA 52577	AT-LARGE MEMBER	0	0	0
AARON PHILLIPS 414 NORTH 3RD ST, OSKALOOSA, IA 52577	AGENCY REP	0	0	0
MARTHA ZYLSTRA 500 HIGH AVE W, OSKALOOSA, IA 52577	AGENCY REP	0	0	0

Part V Other Information (Note the statement requirements in the instructions for Part V.)

	Yes	No
33 Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>
34 Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T.		
a Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes," has it filed a tax return on Form 990-T for this year?	<input type="checkbox"/>	<input type="checkbox"/>
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	<input type="checkbox"/>	<input checked="" type="checkbox"/>
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ► 37a _____		
b Did the organization file Form 1120-POL for this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes," complete Schedule L, Part II and enter the total amount involved 38b _____		
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9 39a _____		
b Gross receipts, included on line 9, for public use of club facilities 39b _____		
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ► _____ ; section 4912 ► _____ ; section 4955 ► _____		
b Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ► _____		
d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization ► _____		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.	<input type="checkbox"/>	<input type="checkbox"/>
41 List the states with which a copy of this return is filed. ► _____		
42a The organization's books are in care of ► <u>JULIE M HYLAND</u> Telephone no. ► <u>641-673-6748</u> Located at ► <u>500 HIGH AVENUE WEST, OSKALOOSA, IA</u> ZIP + 4 ► <u>52577</u>		
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If "Yes," enter the name of the foreign country: ► _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts .		
c At any time during the calendar year, did the organization maintain an office outside of the U.S.?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If "Yes," enter the name of the foreign country: ► _____		
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the tax year ► 43 _____ <input type="checkbox"/>		
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	<input type="checkbox"/>	<input checked="" type="checkbox"/>
45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Part VI

Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only. All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

	Yes	No
46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46	<input checked="" type="checkbox"/>
47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	47	<input checked="" type="checkbox"/>
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	<input checked="" type="checkbox"/>
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a	<input checked="" type="checkbox"/>
b If "Yes," was the related organization a section 527 organization?	49b	<input checked="" type="checkbox"/>

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

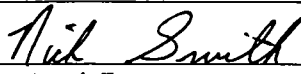
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
NONE				

f Total number of other employees paid over \$100,000 ▶

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
NONE		

d Total number of other independent contractors each receiving over \$100,000 . . . ▶

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.			
	 Signature of officer		5-14-2010 Date	
	NICK SMITH, TREASURER Type or print name and title			
Paid Preparer's Use Only	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Preparer's identifying number (See instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4	EIN		Phone no

May the IRS discuss this return with the preparer shown above? See instructions ▶ ☐ Yes ☐ No

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

OMB No. 1545-0047

2009

Open to Public Inspection

42 : 0869502

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

9 ☐ An organization that normally receives: (1) more than 33⅓ % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33⅓ % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I **b** ☐ Type II **c** ☐ Type III—Functionally integrated **d** ☐ Type III—Other

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? ☐

(ii) A family member of a person described in (i) above? ☐

(iii) A 35% controlled entity of a person described in (i) or (ii) above? ☐

h Provide the following information about the supported organization(s).

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

[illegible]

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	361,762	396,490	378,670	462,559	406,054	2,005,535
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0	0	0	0
3 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0	0	0	0
4 Total. Add lines 1 through 3	361,762	396,490	378,670	462,559	406,054	2,005,535
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						531,068
6 Public support. Subtract line 5 from line 4.						1,474,467

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	361,762	396,490	378,670	462,559	406,054	2,005,535
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	2,393	4,359	6,584	3,774	2,001	19,111
9 Net income from unrelated business activities, whether or not the business is regularly carried on	2,398	1,048	1,806	2,397	2,980	10,629
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	0	0	0	0	0	0
11 Total support. Add lines 7 through 10						2,035,275
12 Gross receipts from related activities, etc. (see instructions)					12	2,035,275
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	72 %
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	73 %
16a 33 1/3 % support test—2009. If the organization did not check the box on line 13, and line 14 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input checked="" type="checkbox"/>		
b 33 1/3 % support test—2008. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17a 10%-facts-and-circumstances test—2009. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 10%-facts-and-circumstances test—2008. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

PART I, LINE10 - TOTAL GRANTS AND SIMILAR AMOUNTS PAID

CASH ALLOCATIONS		224,728
SPECIAL GRANTS		73,049
5K & FAMILY FUN DAY	4,761	
DAY OF CARING	1,853	
OPERATION BACKPACK	5,573	
VITA TAX SITE	5,536	
UNITED WAY 2-1-1	2,000	
OTHER UNITED WAY PROGRAMS	4,216	
DUES TO STATE & NATIONAL AFFILIATES	4,125	28,063
Total		325,840

PART III, Line 28 & 29 - CASH GRANTS AND ALLOCATIONS

	Allocations (Line 28)	Special Grants (Line 29)	Total
4-H	16,000	-	16,000
Big Brothers Big Sisters	15,000	-	15,000
Crisis Intervention Services	25,000	37,889	62,889
Ecumenical Food Cupboard	8,500	10,000	18,500
Food Bank of Southern Iowa	11,000	-	11,000
Fremont Childcare	2,710	-	2,710
Girl Scouts of Greater Iowa	3,000	-	3,000
Imagine the Possibilities	24,000	3,900	27,900
Iowa Legal Aid	7,500	-	7,500
Kids' Corner Child Care Center	7,000	6,000	13,000
Love In the Name of Christ	20,000	10,000	30,000
Mahaska County Agency on Aging	10,000	600	10,600
Mahaska Hospice Auxilliary	12,000	-	12,000
Mahaska Health Partnership Foundation	6,250		6,250
Mid-Iowa Council, Boy Scouts	1,680	-	1,680
New Hope Community Center	12,000		12,000
New Sharon Community Child Care Center	7,312	-	7,312
Oskaloosa Education Foundation	-	1,000	1,000
South Central Iowa Center for Independent Living	6,000	3,660	9,660
SIEDA Nest Program	5,000	-	5,000
YMCA	21,560	-	21,560
United Way of Wapello County	2,466	-	2,466
United Way of Central Iowa	750	-	750
Total	224,728	73,049	297,777

PART III LINE 31 - OTHER PROGRAM SERVICES

5K & FAMILY FUN DAY	4,761
DAY OF CARING	1,853
OPERATION BACKPACK	5,573
VITA TAX SITE	5,536
UNITED WAY 2-1-1	2,000
OTHER UNITED WAY PROGRAMS	4,216
DUES TO STATE & NATIONAL AFFILIATES	4,125
Total	28,063

PART V, LINE 33 - ACTIVITIES NOT PREVIOUSLY REPORTED TO IRS

In 2009, United Way of Mahaska County became certified as an IRS VITA Income Tax Assistance Site. 127 tax returns were e-file, bringing in over \$140,000 in federal refunds, including \$71,000 in Earned Income Tax Credits. \$15,000 in state tax refunds were also generated.

In 2009, United Way of Mahaska County held its first annual 5K & Family Day. The event was organized to promote awareness of community human service organizations and their services and to provide a healthy and fun day of activities for families in the community.

In 2009, United Way of Mahaska County took the lead in Operation Backpack, a local effort to provide back-to-school supplies to students in the Oskaloosa School District that qualified for free/reduced lunch. 336 backpacks, filled with supplies, were distributed.



United Way of Mahaska County

BY-LAWS

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ARTICLE I

Name

ARTICLE I. Section 1. Name

- 1.1 The official name of the corporation is United Way of Mahaska County.

ARTICLE II

Membership

ARTICLE II. Section 1. Board of Directors

- 1.1 The Board of Directors shall consist of a president, a vice-president, a treasurer, a secretary, members-at-large, and agency representatives chosen by the agencies receiving financial support from United Way of Mahaska County for a total of 15 board members.
- 1.2 The Board of Directors shall be responsible for:
- a. Setting the general policies of the United Way organization
 - b. Overseeing the affairs, business, and activities of the United Way organization.
 - c. Establishing the salary for staff, and/or other administrative personnel of the United Way organization.
 - d. Reviewing existing participating agencies for continued compliance with the United Way by-laws.
 - e. Reviewing and approving all prospective organizations making application for United Way participation

ARTICLE II. Section 2. Members-at-large

- 2.1 The number of members-at-large on the Board of Directors shall be thirteen which includes the officers.
- 2.2 Each member-at-large shall serve a three year term and be elected by the Board of Directors. The term of office for the members-at-large shall be such that one-third of the total will vacate their office each year
- 2.3 A member-at-large shall have voting privileges.
- 2.4 If a member-at-large resigns during the term of office with less than one year remaining in said term, the president shall appoint a temporary member to fill the remainder of the term. If a member-at-large resigns from the Board of Directors with one year or more of said term remaining, the vacancy shall be filled by a member-at-large elected by the Board of Directors
- 2.5 A member that fails to attend three board meetings throughout the year will receive written notification from the Executive Director that another absence may be grounds for removal of a member subject to the discretion of the Executive Committee.
- 2.6 A member-at-large shall not serve more than two consecutive terms, but shall be eligible for re-election after absence from the board for one year.
- 2.7 A member-at-large must serve at least one year to be eligible to serve as an officer.
- 2.8 A member completing the term for another member will be eligible to serve two full consecutive terms.

ARTICLE II. Section 3. Agency Members

- 3.1 There shall be two agency members on the Board of Directors representing the agencies receiving financial support from the United Way organization. One of these agency representatives will also serve on the executive committee
- 3.2 The selection of the two members to the Board of Directors shall be at the discretion of the member agencies. The term of service for an individual agency shall be for two years commencing in January of each year. The agencies shall inform the board of representatives for the year in December of the preceding year. Terms of the agency representatives shall be staggered so that one member will vacate the office each year
- 3.3 An agency representative shall have voting privileges
- 3.4 An agency representative will be an active member of the respective agency.
- 3.5 A member that fails to attend three board meetings throughout the year will receive written notification from the Executive Director that another absence may be grounds for removal of a member subject to the discretion of the Executive Committee.

ARTICLE III

Officers

ARTICLE III. Section 1. President

- 1 1 The president shall serve a two year term and be elected by the Board of Directors at the December meeting. The president shall have voting privileges only in the case of a tie vote.
- 1.2 The president's duties include but shall not be limited to the following:
 - a. Presiding over all general meetings of the Board of Directors and the Executive Committee.
 - b. Forming all necessary committees to carry on the activities of the United Way organization
 - c. Coordinates the chairperson of all committees.
 - d. Presents annual review of the Executive Director.

ARTICLE III. Section 2. Vice-President

- 2.1 The vice-president shall serve a two year term and be elected by the Board of Directors at the December meeting. The vice-president shall have voting privileges unless acting on behalf of the president. The vice-president will automatically succeed to the position of president after completion of the two year term.
- 2 2 The duties of the vice-president include but shall not be limited to the following:
 - a. Acting on behalf of the president when the president is absent.
 - b. Acting as chairperson of the Finance Team.

ARTICLE III. Section 3. Treasurer

- 3 1 The treasurer shall serve a two year term and be elected by the Board of Directors. The term of office shall be arranged so as not to coincide with the expiration of the term of the secretary. The treasurer shall have voting privileges.
- 3.2 Duties of the treasurer shall include but not be limited to the following:
 - a. Responsible for overseeing the handling of all income and disbursements for United Way.
 - b. Ensure that accurate records of finances are kept and that monthly financial reports are prepared for review by the board.
 - c. Invest any and all accumulating funds into interest-bearing, short-term bank accounts to maximize the return of these funds as approved by the Board of Directors.

ARTICLE III. Section 4. Secretary

- 4.1 The secretary shall serve a two year term and be elected by the Board of Directors. The term of office shall be arranged so as not to coincide with the expiration of the term of the treasurer. The secretary shall have voting privileges.
- 4 2 Duties of the secretary include taking minutes at monthly meeting and submitting the minutes to the Executive Director and other duties as may from time to time be designated by the President

ARTICLE IV

Meetings

ARTICLE IV. Section 1. Regular Meetings

- 1 1 Regular meetings of the Board of Directors shall be held monthly. Robert's Rules of Order shall prevail at all meetings of the Board of Directors.
- 1 2 The first regularly scheduled board meetings of the year shall be declared as the official annual meeting of the Board of Directors, and duly elected officers and members-at-large shall be installed and take office with the commencement of this annual meeting.
- 1 3 Minutes for each meeting are required and will be submitted to the Executive Director.

ARTICLE IV. Section 2. Executive Committee Meetings

- 2.1 The Executive Committee will meet as called by board President
- 2 2 Minutes for each meeting are required and will be submitted to the Executive Director.

ARTICLE IV. Section 3. Team/Committee Meetings

- 3 1 All team/committee meetings shall be called and organized at the discretion of the committee chairperson.
- 3 2 Each committee chairperson is responsible to have minutes recorded and submitted to the Executive Director prior to the next board meeting

ARTICLE IV. Section 4. Audit

- 4.1 Audits shall be conducted in accordance with all requirements of United Way of America as may from time to time be promulgated by them. The results of all such audits shall be promptly reported back to the board, for the board to take such action as it deems proper.

ARTICLE IV. Section 5. Alternative Manner of Voting

- 5.1 The President or designee may if necessary poll the Directors on any matter by telephone, electronic mail or facsimile. The vote must be acknowledged at the next regular meeting as to the purpose and results of the poll. Such consent shall have the same force as a vote taken at a regular or special meetings and may be accepted without further inquiry by any person relying thereon. The Secretary shall be sure to include this vote in the minutes of the next meeting of the board

ARTICLE IV. Section 6. Quorum

- 6.1 A quorum for all meetings of the Board of Directors shall consist of a simple majority of all voting members provided a minimum of five members-at-large of the Board of Directors is present.
- 6.2 If at any meeting of the Board of Directors a quorum does not exist, the meeting will be deemed as an "information" meeting. At any meeting where a quorum does not exist no motion requiring approval by a vote of the Board of Directors shall be considered

ARTICLE V **Teams/Committees**

ARTICLE V. Section 1. Organization Team

- 1.1 The Organization team will be responsible for all functions of the former New Directions team and the former Nominating committee.

ARTICLE V. Section 2. Nominating Committee

- 2.1 The Nominating Committee consists of three or more members coordinated by the President.
- 2.2 It is the duty of the Nominating Committee to recommend and nominate to the Board of Directors individuals for the office of president, vice-president, treasurer, if so required; secretary, if so required; and replacement of any member-at-large retiring from the Board of Directors. The nominations and election shall take place at the December Board of Directors meeting. All nominees for office must have served at least one year as a member at large.

ARTICLE V. Section 3. By-laws - Policies & Procedures Committee

- 3.1 The By-laws and Policies & Procedures Committee consists of a minimum of three members
- 3.2 The purpose of the By-laws - Policies & Procedures Committee shall be:
- a. Annually review by-laws, policies, and procedures.
 - b. Recommend changed to by-laws, policies, and procedures as necessary.

ARTICLE V. Section 4. Awareness Team

- 4.1 The Awareness team will be responsible for all function of the Campaign Committee and Public Relations Committee.

ARTICLE V. Section 5. Campaign Committee

- 5.1 The Campaign Committee consists of the vice-president, who chairs the committee, the Awareness Team chair, and other volunteers.
- 5.2 The duties of the Campaign Committee shall be the following:
- a. Review and evaluate the past campaign along with the executive director.
 - b. Plan and organize, with the executive director, the annual campaign by developing specific objectives and strategies for each campaign segment.
 - c. Develop campaign theme
 - d. Develop overall campaign organizational plan and timetable
 - e. Recruit volunteer leadership and meet as needed with campaign leadership during the campaign

ARTICLE V. Section 6. Public Relations Committee

- 6.1 The public relations committee consists of a minimum of three board members
- 6.2 The duties of the Public Relations Committee shall be to:
- a. Assist in developing campaign materials and appropriate media coverage.
 - b. Work to assure that United Way remains a year round presence in the community

ARTICLE V. Section 7. Finance Team

- 7.1 The Finance Team shall consist of the President, Vice-President, Treasurer, and Executive Director and will be chaired by the President.
- 7.2 The duties of the Finance Team shall consist of the following:
- a. Presentation and recommendation of a budget to the Board of Directors for the board's approval at the last regular board meeting prior to the end of the fiscal year. Said budget should include anticipated overall allocations for United Way agencies, an itemized operating expense budget for administering United Way activities, and an allowance for uncollectible pledges.
 - b. Review such financial records as necessary to see that the budget is in line with the over all plan of service approved by the Board of Directors
 - c. Periodic review and evaluation of all participating agencies to determine their continued adherence to the United Way by-laws and criteria for agency participation. The committee shall make recommendations regarding termination and/or disciplinary action to be taken with an agency found in violation of the United Way by-laws

ARTICLE V. Section 8. Community Investment Committee

- 8.1 The Community Investment Committee is comprised of at 12-15 diverse members, which includes at least five (5) non-Board members, whose duties shall include the following:
- a. Review the funding application and guidelines for Community Investment Committee prior to releasing to funding agencies
 - b. Review all requests received by outside organizations making application for participation in United Way of Mahaska County. The application shall include, at a minimum, the program, facilities, budget, and financial needs of the organization
 - c. Evaluate the eligibility of any organization making application for participation according to the agency participation criteria outlined in Article VI, Section 2 of the United Way by-laws.
 - d. Hold an in-person interview with a representative from each agency applying for participation
 - e. Develop a plan for the Board of Directors outlining the committee's recommended funding (or non-funding) for each applying agency
- 8.2 The board shall have the final authority to determine the allocation to each agency.
- 8.3 The Board of Directors shall set the campaign goal and approve the final United Way budget

ARTICLE V. Section 9. Audit Committee

- 9.1 The Audit Committee shall consist of the President, Treasurer, and Executive Director and will be chaired by the President.
- 9.2 The Audit Committee shall be responsible for the oversight of the audit, review and compilation of the financial statements
- 9.3 The Audit Committee shall be responsible for the selection of an independent accountant.

ARTICLE V. Section 10. Executive Committee

- 10.1 The Executive Committee shall be responsible for performing duties of the Board of Directors as stated in Article II, Section 1.2
- 10.2 The Executive Committee consists of the president, vice-president, treasurer, secretary, and one agency representative as appointed by the president. Four members of the committee are required for a quorum.
- a. Agency representatives appointed to the Executive Committee must be in their second year of serving on the Board of Directors.
- 10.3 If situations should arise requiring immediate attention which cannot be delayed to a subsequent meeting of the Board of Directors, the president has the authority to call a special meeting of the Executive Committee.
- 10.4 The president shall report any actions taken as a result of the Executive Committee meeting at the next regularly scheduled meeting of the Board of Directors.
- 10.5 Review all requests received from participating agencies for a major fund-raising drives outside of the United Way annual campaign and reasons and needs for this request
- 10.6 The President will have the ability to exceed the six (6) year term to fulfill the term of Presidency
- 10.7 The Executive Committee is responsible for completing an annual review and in determining compensation for the Executive Director

ARTICLE V. Section 11. Other Committees

- 11.1 Such other committees and their chairpersons are appointed by the president as needed.

ARTICLE VI
Participating Agency

ARTICLE VI. Section 1. Application

- 1.1 Any organization desiring to participate as an active member of United Way shall direct a formal written request of application to the executive director on an annual basis. Upon receipt, the executive director shall forward this application to the chairperson of the Finance Team for final review and evaluation.
- 1.2 Before any organization can be considered and evaluated by the Finance Team, the executive director shall request the applicant include the following information with their application.
 - a. A statement by the organization's president and/or secretary certifying that its governing board has read the by-laws of United Way and has voted to apply for United Way membership.
 - b. A detailed statement of the history, purpose, active programs, and work of the organization
 - c. A detailed statement of the assets and liabilities and the last annual statement of receipts and expenditures of the organization.
 - d. A detailed annual budget translating program plans of the organization into financial terms.
 - e. A list of the officers and directors of the organization
 - f. A signed agreement indicating the organization's willingness to cooperate with United Way in fund-raising activities, planning for the needs of the community, communicating their services to the public, and allocating their funds through an equitable citizen-review process.

ARTICLE VI. Section 2. Criteria for Participation

- 2.1 Each organization shall be incorporated or chartered according to the laws of the State of Iowa.
- 2.2 Each organization shall be a non-profit organization exempt from taxation under section 501(c)(3) of the Internal Revenue Code.
- 2.3 Each organization submitting an application shall be governed by a formally organized Board of Directors holding regular meetings. This Board of Directors shall include representative lay citizens of Mahaska County and shall implement effective administrative controls of the organization's budget.
- 2.4 Each organization submitting an application shall have a legitimate purpose with no avoidable duplication of work or activity conflicting with another United Way member agency
- 2.5 Each organization submitting an application shall obey all local, state and federal laws while providing services to Mahaska County residents
- 2.6 Each organization submitting an application shall certify compliance with the USA Patriot Act and other counterterrorism laws.

ARTICLE VI. Section 3. Responsibilities

- 3.1 Each participating agency shall appoint a representative to communicate and work with United Way Board of Directors.
- 3.2 Each participating agency shall share in the benefits of participation in United Way. Each participating agency agrees to be subject to the duties and responsibilities imposed by such participation as prescribed in the Article of Incorporation and the United Way by-laws. Each agency, however, shall retain full and complete responsibility for efficient program management, adequate material and personnel resources, and sound financial operations.
- 3.3 Each participating agency shall be responsible for publicizing and interpreting its program and services to the public. In addition, each agency shall cooperate with the United Way Board of Directors in a joint and mutual effort to publicize the agency's program and community services
- 3.4 All activity regarding methods of publicity, promotion and solicitation of funds by a participating agency shall be conducted in an ethical, professional manner
- 3.5 Each participating agency is required to use the funds allocated in the methods proposed in their application. The agency shall provide further accounting as requested by the United Way of Mahaska County Board of Directors.
- 3.6 Each participating agency shall adhere to the Supplemental Fundraising Policy noting the repercussions of violating such policy
- 3.7 Each participating agency shall adhere to all requirements listed in signed Agency Agreement.

The above information has been reviewed by our Board of Directors and we agree to abide by these By-Laws.

Member Agency

Agency Board President

Agency Representative

Date

ARTICLE VII
Disbursements

ARTICLE VII. Section 1. Disbursements

- 1 1 Disbursement of funds shall be made at the discretion of the Executive Committee. A reserve of 25% of the current annual agency allocations shall be maintained at all times

ARTICLE VIII
Amendments

ARTICLE IX. Section 1. Amendments

- 1.1 Any portion of these by-laws may be supplemented, amended, or replaced at any meeting of the Board of Directors provided that the substance of the proposed change, addition, or deletion shall have been clearly stated, and explained.
- 1 2 Any portion of these by-laws may be supplemented, amended, or replaced by the affirmative vote of at least two-thirds of all voting members of the Board of Directors.

ARTICLE IX
Fiscal Year

ARTICLE X. Section 1. Fiscal Year

- 1 1 The fiscal year of United Way of Mahaska County shall be from January 1 to December 31.