



COMMUNITY INVESTMENT GUIDELINES

For the funding cycle beginning 7/1/2025 and ending 6/30/2026

APPROVED FEBRUARY 2025

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BEFORE YOU BEGIN

United Way Emerald Coast (UWEC)'s Community Investment Guidelines (referred to as “handbook”) provides a comprehensive overview of who we are and how our process works. It includes requirements on eligibility, reporting, and programmatic focus. Each section is designed to answer common questions about our grantmaking priorities with the overall goal of helping your organization submit the most successful application possible.

This handbook supersedes all previously issued handbooks and guidelines. UWEC reserves the right to revise or update this document without prior notice.

Questions about UWEC, our priorities, and the process are welcome! Please note, we observe a 4-day work week with office hours Monday-Thursday from 9-4pm. On Fridays, please expect delays on response times.

Contact Information for United Way Emerald Coast:

- Address: 112 Tupelo Ave SE, Fort Walton Beach, FL 32548
- Email: admin@united-way.org
- Phone: 850-243-0315

Key Impact Department Staff:

- **Kelly Jasen**, President & CEO | kelly@united-way.org | 850-812-3382
- **Darra Flanagan**, Director of Impact | darra@united-way.org | 850-920-2299
- **Tammy Barrientos**, Impact Coordinator | tammy@united-way.org | 850-812-4515

Key Volunteer Committees that Support our Impact Work:

- **Board of Directors:** UWEC is a volunteer driven organization. The Board of Directors, comprised of community leaders serving voluntarily, provides mission-based leadership and strategic governance. While day-to-day operations are led by the President & CEO, the Board-CEO relationship is a partnership, and the appropriate involvement of the Board is both critical and expected. The decisions of the Board of Directors are final.
- **Impact Committee:** This volunteer Committee establishes funding priorities, provides direction on the allocation of resource investments, and measures the results of our internal programs as well as funded partner activities to best position UWEC in meeting our community impact goals. Some or all of these responsibilities may be assigned to UWEC's Equity Committee.
- **Community Investment Volunteers:** These volunteers make a financial gift to UWEC. They serve on a panel aligned with a focus area (either healthy community, youth opportunity, and financial security); they review grant applications within their focus area, participate in presentations by the applicants, and make funding recommendations to UWEC's Staff and Board of Directors.

INTRODUCTION TO UNITED WAY EMERALD COAST (UWEC)

MISSION

Unite people with resources to improve the quality of life in Okaloosa and Walton counties.

VISION

To build a united community where everyone has the opportunity to achieve their full potential.

EQUITY STATEMENT

UWEC seeks to mobilize all people to improve lives and create a community where everyone has the opportunity to achieve their full potential. In order to unite around key issues facing Okaloosa and Walton counties, UWEC engages and supports individuals and organizations who represent the diversity of the communities we serve – respecting and valuing the different perspectives they may provide. Together, united, we will more effectively create and implement solutions to address our region’s most critical issues while creating opportunities for a better life for all.

SERVICE AREA

Okaloosa and Walton counties, Florida

OVERVIEW

UWEC mobilizes communities and partners to action, empowering neighbors to thrive. By advancing health, youth opportunities, and financial security, we strengthen resiliency and create a more equitable future. Our focus prioritizes services that directly support the ALICE (Asset Limited, Income Constrained, Employed) population – hardworking households striving to make ends meet while planning for a better future. Together, united, we can move families from surviving to thriving, creating lasting and measurable change across our community.

For more than 65 years, UWEC has been connecting people and resources to improve the community. While UWEC has historically been a fundraising entity, we have expanded to a truly unique position to recruit, convene, and collaborate with the people and organizations who bring the passion, expertise, and resources needed to get things done. Today, we work with thousands of individuals, hundreds of workplaces, and nearly 50 non-profit organizations that share a collective vision for what is possible when we unite our efforts.

IMPACT APPROACH

Our strategy at UWEC is to provide funding to programs that support community-wide goals *and* to go above and beyond to advocate for community change, convene community leaders around community issues, and to educate the public at large about how to support a united effort for positive community change.

UWEC provides year-round training, advocacy, and volunteer support in addition to grant funding. We are here to help! We strive to be *partners* in our endeavors. Partner Agencies can expect an active collaborator in UWEC. Any expertise, knowledge, or relationships that we can share, we will. Any opportunity we have to listen and learn, we will do that as well. We aim to build a diverse cohort of on-the-ground programs that connect and build upon each other's impact to the betterment of the families in our region. Our comprehensive impact strategy includes internally managed initiatives and programs, opportunities for non-profits to connect and grow, and grant funding.

INTERNALLY MANAGED INITIATIVES AND PROGRAMS

These activities are funded directly by UWEC and/or outside grants written by UWEC; managed by UWEC staff; produce outcomes and offer a service or product.

ALICE Simulations: These immersive, interactive experiences help participants better understand the realities of living in a low to moderate income household and barriers many families face.

Back to School Supply Drive: Annual event ensuring every local child has the tools necessary to be successful in school.

Born Learning Trail: Series of interactive games for young children marked by engaging instructional signs. The trails turn a trip to the park into an active learning experience, helping children develop skills for school readiness.

Crisis Kits: Led by Women United, schools across both counties are equipped with the resources and tools they may need to respond to crisis situations.

Day of Caring: Annual day of community service where hundreds of volunteers are mobilized on projects benefiting local nonprofits, schools and community sites.

Emerging Leaders: Young professionals taking action in philanthropy, volunteerism, and leadership development.

EmpowHER: Led by Women United, these mental health workshops for teenage girls are held twice a year.

Mission United: Program that empowers service members, veterans, and their families by connecting them to the services they need while building a network that supports them.

Family Days (Community Resource Days): Engaging, family-friendly events that bring essential resources together in one place.

ProjectLEAD: Program that prepares emerging and current leaders for roles on non-profit and public sector boards and committees.

ReadingPals: Early literacy initiative focused on supporting children in preschool through 3rd grade by pairing them with a volunteer mentor to read with them once a week throughout the school year.

Retired & Senior Volunteer Program (RSVP): Program geared towards connecting individuals aged 55 and better with volunteer opportunities that help meet our community's most pressing needs.

Ride United: Partnership between UWEC and DoorDash which provides low-cost deliveries to help people access meals and other essential items.

SingleCare: Free prescription drug discount card. <https://www.singlecare.com>

Women United: Female philanthropy group supporting programs and initiatives that improve the mental health of women and girls in Okaloosa and Walton Counties.

211 of Northwest Florida, NWFL Veterans Support Line, and 988: A toll-free, confidential hotline (and website) that connects individuals with resources. Local representatives are available 24/7, 365 days a year by simply dialing 211.

NON-PROFIT ENGAGEMENT

We support training, advocacy, and volunteer placement efforts year-round.

Partner Agency Round Tables (PART): Opportunities to network and collaborate with other non-profit leaders. (Due to staffing changes, these were paused in 2024, but we hope to start them up again in 2025.)

Non-profit Trainings (NPT): Trainings that support local non-profit professionals. (We currently partner with the Greater Fort Walton Beach Chamber of Commerce and Chair the Non-Profit Committee to provide regular trainings throughout the year. In 2024, we also launched our inaugural Non-Profit Summit - an annual day of non-profit development.)

GRANT FUNDING

Community Investment: Funds distributed to certified Partner Agencies with programs focused on providing long-term solutions to improving the health, education, and financial security of our community members.

Emergency Food & Shelter Program (EFSP): Federal funding allocated to local non-profits and governmental social service organizations to provide shelter, food, and supportive services to individuals and families who are experiencing, or at risk of experiencing, hunger and/or homelessness.

Emergency/Disaster Fund: If funding allows, we may offer grants to support response and recovery efforts associated with major disasters and emergencies.

Micro-Grants: If funding allows, we may offer grants (less than \$5,000) to organizations for short-term programs.

Mission United: If funding allows, we may offer grants to programs specifically impacting our veterans/military community.

AGENCY AUTONOMY AND ACCOUNTABILITY

The public has entrusted UWEC with financial contributions and donors have a right to expect the highest professional standards from UWEC. In turn, UWEC expects and requires accountability from each Partner Agency. UWEC recognizes each agency as an autonomous organization with its own governing body. The governing body of each agency is responsible for the development of sound agency policies, management, and administration, including fair and lawful treatment of agency staff and agency clients. Agency operations are independent of UWEC management or administration. UWEC is available to provide Partner Agencies with technical assistance on request or as needed.

COMMUNITY INVESTMENT GRANT OVERVIEW

The Community Investment (CI) process ensures fiscal and program accountability for donors who entrust UWEC with undesignated gifts, typically through employee giving campaigns. Our goal is to strategically invest these funds in high-quality human services that address the most pressing community needs while aligning with UWEC's priorities and strategies.

By maximizing resources, we ensure these investments create meaningful and lasting impacts for those who need us most.

UWEC's grant application process is comprehensive and competitive. Prior to applying, please be certain that your agency/program meets all eligibility criteria. Current or prior funding does not guarantee future funding or the award amount.

Our partners are chosen for their alignment to our strategies and focus areas, their track record of providing high quality programming, and their ability to deliver and report on demographics, impacts, and outcomes. While many non-profits may apply for funding, our resources are limited, and our decisions are ultimately driven by finding the partners who are best positioned to make a sustainable impact on our region.

Applicants are encouraged to request funding for what is *needed* to support their program(s), keeping in mind that the application process is highly competitive, and grant awards will vary based on 1) available funding, 2) quality of the application, 3) program outcomes, 4) presentation and 5) alignment and partnership with UWEC.

Applications for CI funding are accepted from February 5 to March 7, 2025 at 5PM CST through UWEC's online portal (<https://www.united-way.org/2025GrantApplication>). A Partner Agency may submit ONE application for funding for each cycle.

Applicants will be notified of grant decisions by June 30, 2025. If selected for funding, the grant period will begin July 1, 2025 with a final report due by June 13, 2026 .

Every year, the Impact Team collects feedback from agencies, volunteers, and donors, and implements changes based on what is learned. There are a few changes this year:

1. Minimum request/grant award is \$10,000. While this may result in fewer programs being funded, it is expected to increase the average grant amount awarded. It is unusual for UWEC to award \$40,000+ to any single applicant.
2. Heavier weight on applicants' alignment with UWEC's Priorities. Our Priorities are identified in the next section.
3. UWEC trusts non-profits to determine where grant dollars will have the greatest impact. To support applicants in achieving their missions more effectively while encouraging flexibility and sustainability, **2025-26 Community Investment Grant awards may be unrestricted**. However, grant funding CANNOT be used for prohibited activities including contributions to endowments, subcontract agreements, lobbying efforts, capital campaigns, construction or plans to occur outside of the funding period, direct religious activities, debt reduction, stipends to individuals, fundraising events, and/or programs/services located outside of our territory.

CI grants are possible through our fundraising efforts, largely conducted with local companies running Employee Giving Campaigns. Undesignated donor dollars provide for the pool of available funds each year. We will not have final campaign reports and will not know the total amount to award until *at least* April 2025.

We hope to award between \$450,000 - \$525,000 through this funding opportunity. Last year, grants were awarded between \$3,500 and \$43,680 with the average grant amount of \$18,077. This year, we raised the minimum grant amount from \$5,000 to \$10,000 which will likely mean fewer programs will be funded, but the average grant amount is likely to increase. UWEC may fully fund or partially fund program requests based on funds available, appropriate use of funds, and volunteer discretion. UWEC has the right to terminate funding as outlined in the MOU that will be issued to all funded programs.

Guidelines include, but are not limited to:

1. ***Submitting an application does not guarantee funding by UWEC.***

2. All applications are zero-based. Funding in *any* prior grant cycle does not guarantee funding in any future grant cycle.
3. Programs must align with UWEC’s mission, impact areas healthy community, youth opportunity, and financial security and provide measurable outcomes.
4. All programs must demonstrate a deep impact on individuals and families. Applicants are required to use local data to demonstrate the need for the program in the community.
5. Agencies must demonstrate a need for UWEC funds.
6. Special consideration will be given to programs that align with UWEC’s Priorities (detailed in the next section).
7. The minimum request for funding is \$10,000.
8. Incomplete applications are not accepted and will be denied.
9. During the application process, UWEC may request additional information. Failure on the part of the applicant to supply the requested information in the format requested and the timeframe indicated may result in the denial of application.
10. UWEC reserves the right to deny or reject any application from an applicant for any reason the Impact Committee and/or Board of Directors agrees upon.
11. UWEC reserves the right to adjust program and application guidelines.
12. All grant decisions by UWEC’s Board of Directors are final. UWEC reserves the right to not accept appeal requests.

UWEC funding **may not** be used for the activities listed below. While these causes are important for creating vibrant communities, they do not fit the focus of UWEC’s Community Impact work.

- Contributions to endowments or capital expenses
- Subcontract agreements, this includes fiscal agents
- Lobbying efforts designed to influence legislation
- For-profit organizations
- Capital campaigns or requests including: buildings, vehicles, equipment, land, plans, construction, renovations or other expenses geared towards improving the organization’s fixed assets
- Direct religious activities, such as religious worship, instruction, or proselytizing
- Debt reduction or existing obligations
- Stipends given directly to individuals
- Fundraising events
- Programs located outside of our territory

PRIORITIES

GEOGRAPHIC AREA:

UWEC prioritizes funding for services that directly benefit individuals residing in Okaloosa and Walton counties. While we recognize that some partner organizations may have offices or headquarters located outside our service area, **applicants must demonstrate authentic connections to this local community.**

FOCUS AREAS:

We strive to see results by working through various agencies, programs, and community partnerships focused on three community priorities, which we call our Focus Areas. UWEC believes focusing funding and efforts in these areas will make the greatest difference in our community. Applicants must choose one Focus Area that most closely aligns with their request.

UWEC's Focus Areas for 2025-26 are:

1. **Healthy Community:** Improving health and well-being for all.
2. **Youth Opportunity:** Helping young people realize their full potential.
3. **Financial Security:** Creating a stronger financial future for every generation.

Accepted outputs and outcomes for each Focus Area are detailed in the 2025-26 Community Investment Application (Appendix A).

ALICE®:

UWEC is committed to serving and supporting ALICE®. ALICE, a United Way acronym for Asset Limited, Income Constrained, Employed, is a way of defining and understanding the struggles of households that earn above the Federal Poverty Level, but not enough to afford a bare-bones household budget. For far too many families, the cost of living outpaces what they earn.

According to United Way of Florida's ALICE Report, 37% of households in Okaloosa and Walton counties are struggling to manage even their most basic needs – housing, food, healthcare, childcare, transportation, and technology.

When funds run short, cash-strapped households are forced to make impossible choices, such as deciding between quality childcare or paying the rent, filling a prescription, or fixing the car. These short-term decisions have long-term consequences not only for ALICE families, but for all of us. We envision a world where all those who work to keep our local economies running can support themselves and their families.

Please consider the ALICE Report in your proposal and to the extent possible draw connections to your proposed project and closing gaps for those living below the ALICE threshold.

You can find more information on ALICE by visiting www.united-way.org/alice or www.uwof.org/alicer

COLLABORATION:

UWEC believes that collaboration is essential to achieving meaningful, sustainable impact. We value partnerships that amplify resources and expertise to address complex challenges. While funding is an important component of our partnerships, we value agencies that engage with UWEC in ways that extend beyond financial support. Whether through participating in our initiatives, contributing to advocacy efforts, or engaging in community events, we look for organizations that align with our mission of uniting people and resources to improve lives.

We encourage agencies to move beyond competition and seek opportunities to partner with others, leveraging collective strengths to create greater value for those we serve. **In your application, we encourage you to highlight how your program builds and strengthens collaborative efforts.** Describe any partnerships you've established, including other non-profits, local businesses, or community organizations, and explain how these collaborations enhance your program's outcomes.

APPLICATION PROCESS TIMELINE

Grant Training Workshop (mandatory – pick one): February 3 or 5, 2025

Application Opens: February 5, 2025 <https://www.united-way.org/2025GrantApplication>

Application Closes: March 7, 2025 at 5pm CST NO EXCEPTIONS OR EXTENSIONS!

Presentations (in person, at UWEC): March 31 – April 3rd

Award Notification: by June 30, 2025

Grant Period: July 1, 2025 – June 30, 2026

Payments: 50% of funding on or before July 30, 2025; 25% on or around January 2026; 25% on or around April 2026

APPLICATION PROCESS

All partner agencies are eligible to apply for funding through the process outlined below:

1. Apply for – and be accepted as – a certified Partner Agency.
2. Attend mandatory Grant Training Workshop.
3. Submit Grant Application on or before March 7, 2025 at 5pm (no exceptions or extensions).
1. Pre-Screening: Applications will be reviewed by UWEC staff and/or the Impact Committee to determine if the application is complete, if appropriate attachments were provided, if the minimum eligibility requirements are satisfied and if the organization is eligible for consideration in the CI grant process. Eligibility determination does not necessarily result in funding.
2. Volunteer Review: If the application passes the pre-screening, it will go on to be reviewed by CI volunteers. Community Investment Volunteers will evaluate: the quality and effectiveness of the program, amount of available dollars, the number of agencies applying, the urgency of existing needs, and other key variables important to UWEC. Volunteers will evaluate each proposal based on the rubric found on Appendix C.
3. UWEC Review: UWEC will complete an annual evaluation of the Partner Agency relationship that may include but not necessarily be limited to participation in trainings, program/initiative support (such as Day of Caring, RSVP, or corporate requests for volunteer projects), co-branding, campaign support, timely responses to requests for information, and general cooperation. The organization's overall score will be shared with volunteers and averaged into the applicant's scores.
4. Presentations: Partner Agencies will familiarize CI volunteers with the agency's mission, day-to-day program activities, staff and Board Members, and the specifics of the grant request through an in-person presentation. Specific instructions will be provided prior to the presentation. Between careful review of the written application information

presented and further evaluation, the committee hopes to get a complete picture of your program, the needs being addressed and the level of appropriateness for funding.

5. Deliberations: Program scores will be gathered and presented to CI volunteers, and they will use these scores as a basis for assigning investment dollars. Deliberations result in the funding plan that is presented to UWEC's Board of Directors for their approval.
6. Board Approval: CI Chair, a member of UWEC's Executive Committee, or UWEC President & CEO will present recommendations to the UWEC Board of Directors for final approval.
7. Award Notifications: UWEC's President & CEO will reach out to all applicants to notify them of the funding decision.
8. Grant Payments: All funded programs will receive their first grant payment (6 months of funding) on or before July 30, 2025; following receipt of a fully executed MOU. The remaining allocations will be distributed after volunteers have reviewed semi-annual reports and approved continued funding around January 2026 (25%) and April 2026 (25%). Exact payment dates and expectations will be included in the MOU available in June 2025.

REPORTING REQUIREMENTS

All funded programs will be required to track and report results using a template provided by UWEC. At least two reports are due a year. Reports consist of outcomes, demographics, client stories, etc. We believe we are providing agencies with ample notice regarding the data they will need to submit; grouping the majority of clients into an "unknown" category or indicating you could not measure your outputs/outcomes as stated in your application, is unacceptable.

Additional reports may be requested throughout the year, such as general demographic and geographic data on clients served to provide donors with information on how and where their donations are used in the community.

All programs selected for UWEC funding will receive a funding agreement by July 2025 that will outline all expectations for funded partners, including reporting requirements. A sample MOU may be found on Appendix D.

Grantees are expected to submit complete reports on time. Mid-Year Reports are due and reviewed for accuracy and completion before Q3 and Q4 distributions can be made. If a mid-year report is late by 1-7 calendar days, 10% funding may be withheld from Q3 and Q4 distributions. If a mid-year report is late by 8-14 calendar days, 25% funding may be withheld from Q3 and Q4 distributions. If mid-year report is 15+ days late, the Board will convene to determine the penalty which may be no less than 25% of Q3 and Q4 distributions, up to withholding full payments as organization will be seen out of compliance with MOU agreement.

Failure to submit a Final Report on time will jeopardize future grant funding eligibility and/or future payments may be reduced upon the Board's discretion. A Sample Reporting Template may be found on Appendix E.

The grant period spans across two calendar years. Funded organizations will *most likely* be required to reapply to maintain their status as a Partner Agency during the grant period. Maintaining Partner Agency status is essential for continued eligibility to receive funding from UWEC. Failure to maintain Partner Agency status will result in a loss of funding for the second half of

the grant period. We encourage all applicants to carefully ensure they meet requirements throughout the duration of their funding.

CO-BRANDING POLICY

United Way's brand has been recognized by Forbes as one of the World's Most Valuable Brands. Co-branding with UWEC is a powerful marketing and fundraising tool that can help extend the reach of both the Partner Agency and UWEC. We believe that co-branding is critical to the success of UWEC's annual campaign. Your visible support, and the visible support of your board and staff members, will heighten the community's awareness and appreciation of UWEC; thereby assist in raising more funding for the community.

All Partner Agencies are encouraged to share and promote their relationship with United Way Emerald Coast. Funded Partners are expected to actively co-brand with UWEC and recognize UWEC in the same manner that they would a corporate sponsor/supporter (when and where appropriate). The *minimum* expectations are detailed in the Sample MOU (Appendix D). You'll notice the recognition is offered in terms of tiers, and requirements are based on the annual funding amount.

UWEC will provide your organization with logos as well as a marketing guide/toolkit with sample messaging you may choose to use. To maintain the integrity of United Way's brand, the UWEC logo must always appear in its entirety, without any modification or color revisions. If a Partner Agency has any questions or is unsure as to whether the logo usage is appropriate for a particular event/materials, please contact UWEC immediately. Failure to comply with these expectations may result in a loss of funding and/or impact eligibility for future funding and will be at the discretion of UWEC's Board of Directors.

ENFORCEMENT

There are additional reporting requirements and expectations that will be detailed in the Memorandum of Understanding (MOU) executed and agreed upon by both parties in June 2025. A violation of Partner Agency policies or MOU expectations will be reported to the Chair of UWEC's Impact Committee. The Impact Committee Chair, or UWEC's President & CEO, will meet with UWEC's Executive Committee to report on the violation and make a recommendation to the Board of Directors on a course of action to take. Violations will be reviewed on a case-by-case basis. All penalties shall be within the authority of UWEC's Board of Directors.

TERMINATION OF PARTNERSHIP STATUS

All Partner Agencies are reviewed at least annually to determine compliance with policies and procedures. These reviews may disclose issues which are serious enough to warrant consideration of probation, grant/designation payment suspension, or termination of partnership.

Events leading to Termination of Partnership Status include, but are not limited to, the following:

- Noncompliance with program, reporting, or MOU requirements

- Failure to meet program goals
- Failure to uphold UWEC co-branding standards
- Provision of poor-quality service;
- Poor accountability of funds or mismanagement or appropriation of funding;
- Decision not to participate in required meetings;
- Decision not to reapply as a Partner Agency or submission of an incomplete or unacceptable application;
- Decision not to inform UWEC of significant staffing, financial concerns, or program changes.

PROCESS

If concerns are raised about a Partner Agency's compliance, UWEC's Executive Committee will evaluate the issue and UWEC's President & CEO will notify the Partner Agency in writing. A meeting may be requested with Partner Agency representatives, including relevant staff and Board members, to discuss the concerns and provide an opportunity for the Partner Agency to respond.

UWEC and the Partner Agency may collaborate to develop a remediation or compliance plan with a clear timeline for resolving the identified issues. The plan will be communicated in writing to both parties.

If the Partner Agency fails to comply with the remediation plan, submit required documentation, maintain communication, or achieve agreed-upon outcomes within the timeline, UWEC may place the Agency on probation, which could include reducing or suspending grant payments.

Termination of partnership will be considered if the Partner Agency does not take effective remedial actions. Written notice will be provided in such cases.

UWEC reserves the right to expedite termination without advance notice in cases of fraud, criminal activity, failure to meet critical obligations outlined in the MOU or this handbook, or other egregious and serious violations as determined by UWEC's Board of Directors.

AGENCY-INITIATED TERMINATION

A Partner Agency may terminate its UWEC Partner Agency Status at any time by submitting a written notice to UWEC's President and CEO, Kelly Jasen at kelly@united-way.org. All United Way funding and Partner Agency privileges shall terminate immediately.

UNITED WAY LOGOS AND IDENTIFICATION

Upon termination of the partnership for any reason, the Partner Agency must cease use of all United Way logos and materials that identify the Agency as a UWEC Partner Agency. UWEC will remove the Partner Agency from its website and similar collateral.

NOTE OF THANKS

We deeply value our partnerships with local non-profits, whose dedication and compassion create lasting change in the lives of thousands of individuals and families throughout Okaloosa and Walton counties each year. Your commitment to serving our community inspires us, and we are honored to collaborate with organizations like yours that share our vision of a thriving and united region.

Together, we tackle complex challenges, uplift those in need, and create opportunities for everyone to achieve their full potential. Your work is essential to building a stronger, healthier, and more equitable community, and we are grateful for the passion and perseverance you bring to your mission every day.

Thank you for considering United Way Emerald Coast as a partner in your impactful work. We look forward to working alongside you to make a difference, united in purpose and dedication. United is the Way!

EXAMPLES AND TEMPLATES

APPENDIX A: APPLICATION FOR FUNDING

United Way Emerald Coast (UWEC)

2025 - 2026 Community Investment Application

<https://www.united-way.org/2025GrantApplication>

Overview:

United Way Emerald Coast mobilizes communities and partners to action, empowering neighbors to thrive. By advancing health, youth opportunities, and financial security, we strengthen resiliency and create a more equitable future. Our focus prioritizes services that directly support the ALICE (Asset Limited, Income Constrained, Employed) population - hardworking households striving to make ends meet while planning for a better future. Together, united, we can move families from surviving to thriving, creating lasting and measurable changes across our community.

Pre-Checklist

1. Are you a current 2025 certified Partner Agency?
2. Do you agree to collect demographic information (age, household income, and area of residence) from your clients, as required by UWEC?
3. Do you understand UWEC funding may NOT be used for any of the following activities: contributions to endowments, subcontract agreements, lobbying efforts, capital campaigns, plans/construction to occur outside of the funding period, direct religious activities, debt reduction, stipends to individuals, fundraising events, and/or programs/services located outside of our territory?
4. Do you understand that you should assume EVERY question is required (unless otherwise stated)? Due to the high volume of submissions, UWEC does not offer courtesy reviews. Your application will be evaluated based on the documents you submit within this online application. Uploading incorrect documents, leaving blank responses, or failure to provide required information will likely result in your application being disqualified. Please ensure all responses are complete and accurate before submitting.

Agency Information

1. Agency's Legal Name
 - a. dba (if different than above)
2. CEO or Executive Director Name, Email and Phone
3. Secondary Grant Contact Name, Email and Phone (if appropriate)
4. Please provide a brief overview of your organization. Include key information such as: a summary of your organization's history and mission; current programs, primary services, or strategies. (Suggested length: 1 paragraph)

Program Information

1. Focus Area (Choose 1)
 - a. Healthy Community: Improving health and well-being for all.
 - b. Youth Opportunity: Helping young people realize their full potential.
 - c. Financial Security: Creating a stronger financial future for every generation.
2. Dollar amount requested:
3. Are you requesting funding for a specific program OR general (operating) support?
4. Provide a concise description of the services for which you are requesting funding. If awarded, this may be used in UWEC's marketing materials. (Suggested length: 1-2 sentences)
5. Statement of Need: Describe the community need(s) you aim to address through this grant. Include relevant local data to demonstrate the urgency of these needs. (Suggested length: 1-3 paragraphs)
6. (if selected Program in #3) Program Overview: Please provide a summary of your program, detailing how it addresses the community need(s) identified above and aligns with the selected Focus Area. Clearly describe the key activities and services offered, including who is eligible to receive them. Explain the frequency and duration of services, as well as where they are provided. Additionally, outline the anticipated results and what success looks like for your clients. Be specific in describing the impact you aim to achieve and how it creates meaningful change in the community. **It is not necessary to restate information provided in previous responses.** (Suggested length: 3-4 paragraphs)
6. (if selected gen/operating in #3): Service Overview: Please provide a summary of your services, detailing how they address the community need(s) identified above and align with the selected Focus Area. Clearly describe the key activities and services offered, including who is eligible to receive them. Explain the frequency and duration of services, as well as where they are provided. Additionally, outline the anticipated results and what success looks like for your clients. Be specific in describing the impact you aim to achieve and how it creates meaningful change in the community. **It is not necessary to restate information provided in previous responses.** (Suggested length: 3-4 paragraphs)
7. Do you (plan to) collaborate with other organizations through your proposed program or services? If so, please list the organization(s) and explain how these partnerships enhance service delivery, improve program outcomes, or benefit participants. Note: We are not looking for a list of funders. (Suggested length 1 paragraph)
8. OPTIONAL QUESTION: How does your program ensure individuals facing barriers - such as ALICE households facing financial hardship, those with limited access to resources, or other challenges - can fully participate in and benefit from your services? Provide specific examples of how you remove obstacles and create meaningful impact, such as offering flexible service delivery, accessible locations, or tailored support.

Target Population

Please describe the target population(s) your program will serve with UWEC funding. If you are applying for general (operating) support, this should reflect ALL your clients.

1. Projected number of unduplicated clients to be served by this grant: _____

2. Age: Please provide your estimated breakdown of clients by age bracket as percentages. The total should add up to 100%.
 - a. ___ 0-18 years ___ 19-64 years ___ 65+ years
3. Household Income: Please provide your estimated breakdown of your target population by household income. The total should add up to 100%.
 - a. ___ % below FPL ___ % within ALICE ___ % above ALICE ___ % unable to collect/determine (please explain why).
4. How do you verify/capture household income? **MULTIPLE selections allowed.**
 - a. ___ Self-reported (i.e. intake forms or surveys), ___ verified through pay stubs, bank statements, or other financial documents, ___ estimated based on eligibility for income-based programs (i.e. SNAP, Medicaid), ___ estimated based on community-level income data (i.e. ALICE data or census information), ___ don't collect (requires explanation in the question above), ___ other (please describe)
5. Please identify the neighborhoods or geographic areas where the clients you serve reside.
6. What tool(s) will you use to capture and track the demographic information required by UWEC? How is this used by staff and clients?
7. Please upload the tool(s) you will be using to capture these demographics from your clients, such as the survey or intake form. Remember, required demographics include # clients served (unduplicated preferred), age, household income, and area of residence.

Performance Measurements

1. Please choose one outcome that best measures your program's success:

Healthy Community:

- % of individuals eating healthier and moving toward a healthy weight
- % of individuals avoiding or reducing risk-taking behaviors (e.g., substance abuse, unprotected sexual activity)
- % of individuals improving or maintaining their mental and/or emotional health
- % of individuals improving or maintaining their physical and/or dental health
- % of individuals reporting an improved quality of life
- % of caregivers increasing their knowledge of physical, social, emotional, and/or cognitive development of those they support
- % of individuals improving or maintaining their ability to live independently by performing daily living tasks or engaging in activities that support their independence

Youth Opportunity:

- % of youth meeting developmental milestones
- % of youth (ages 0-6) meeting school readiness benchmarks
- % of youth earning passing grades in core subject areas

- % of youth placed in internships or employment
- % of youth developing life and/or soft skills
- % youth demonstrating increased creativity, cultural awareness, artistic, or musical skills
- % youth improving STEM knowledge, skills, or interest in STEM careers
- % of youth demonstrating an increase in college, career, and/or military readiness skills
- % of youth demonstrating an improvement in social, emotional, or cognitive development

Financial Security:

- % of individuals gaining employment or advancing in existing employment
 - % of adults who earn job-relevant licenses, certificates, degrees, and/or credentials to meet their career needs
 - % of individuals increasing disposable income (more hours, higher pay, accessing benefits, reducing debt/costs)
 - % of households obtaining or maintaining permanent, affordable housing (rent/mortgage, utility assistance or programs)
 - % of individuals obtaining or maintaining temporary housing/shelter, preventing homelessness
 - % of individuals improving financial behavior, skills, and/or knowledge (i.e. budgeting, opening bank account, increasing credit score, building assets/savings)
2. What percentage of your clients do you anticipate achieving this outcome? ____%
 3. Please explain why this outcome was chosen and how it aligns with your proposal. Describe how achieving this outcome demonstrates the program's impact in addressing the community need(s). (Suggested length: 1 paragraph)
 4. What measurement tool(s) will you use to assess whether the selected outcome was achieved? Explain why you chose this tool, whether it is evidence-based, and how it demonstrates the outcome was achieved. (Suggested length: 1 paragraph)
 5. Please upload the tool(s) you will be using here.

Program Budget

1. Does your organization charge clients, participants, or other agencies for the service(s)? If so, describe how fees are determined or, if fixed, the rate.
2. Describe how the program would be affected if the awarded amount is only 50% of the requested funding. Be specific about how this would impact program delivery, the number of clients served, and other key aspects of the program.
3. What would \$50 achieve, as related to this request? How about \$100?
4. Please complete the budget template form and upload it here.

(OPTIONAL) Is there any additional information you would like UWEC to consider? You may use this space to highlight aspects such as management practices, organizational capacity, volunteer support, diversification of funding sources, matching funds, governance, or other factors that demonstrate your capacity, sustainability and impact.

ACH is the preferred payment method for designations and grant awards. If you provided ACH information on your Partner Agency Application, no further action is needed unless your information has changed. If you did not submit banking information at that time or need to update it, please provide the details below.

- Financial Institution:
- Routing # (9-digit number that identifies your bank or credit union):
- Account #:

Authorization

By submitting this document, the undersigned has carefully read the application and reviewed the information contained in this proposal for accuracy and completeness. You certify that the funds requested in this application are a true estimate of the amount needed to operate the proposed program. You further understand that an incomplete application or failure to provide the information requested, as well as late submission, will likely render the submission as non-qualifying and ineligible for further consideration in this funding cycle.

The undersigned also understands that this grant request is for 7/1/25-6/30/26 only and the applicant would have to re-apply through the grant process for future year funding consideration. The submission of a grant application is not a guarantee of funding.

The undersigned also acknowledges that a 2025-26 Community Investment Grant Guidelines (handbook) was available with further instructions and information on funding priorities and our process.

The submission of this application has been authorized by the organization and you have been duly authorized to act as the representative of the agency in connection with this application.

- Date
- Authorized Official's Name
- Authorized Official's Title
- Authorized Official's Signature

APPENDIX B: BUDGET TEMPLATE

United Way Emerald Coast 2025-26 Community Investment Grant Application

Instructions:

Complete the budget template below providing as much detail as possible for the proposed program. If a funding source or expense is not listed, please account for that income and/or expense(s) in the "other" category and provide an explanation.

If funding is for a specific program within your organization, please complete the budget with that specific program's information. If not, please complete the budget for your organization as a whole.

PLEASE COMPLETE THE GREEN CELLS. GRAY CELLS DON'T REQUIRE A RESPONSE AS THEY WILL AUTOPOPULATE.

Organization:			
Program Period:	7/1/25-6/30/26		
		Current 2024-25 Budget	Proposed 2025-26 Budget
INCOME (round to whole numbers)			
	UWEC Grant Funding		
	Contributions (Individuals, Foundations, Businesses, Grants)		
	Special Events and Fundraisers		
	Membership Dues, Program and/or Service Revenue		
	Investment Income		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Total Income	\$ -	\$ -

PROGRAM EXPENSES (round to whole numbers)			
	Personnel (salaries/wages, benefits and taxes)		
	Contractors and/or Professional Services		
	Travel/Mileage and Vehicle(s)		
	Program Expenses (replace this text with an explanation)		
	Marketing, Printing, Postage & Shipping		
	Occupancy (rent/mortgage, utilities, maintenance, repairs, insurance)		
	Professional Fees or Consultants		
	Office Supplies, Technology, Rental Equipment		
	Food/Beverage and/or Recognition		
	Background Screening		
	Conferences, Training & Professional Development		
	Membership Dues (to National or State Chapter)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Other (replace this text with an explanation)		
	Total Expenses	\$ -	\$ -
	Net Income	\$ -	\$ -

Please provide an explanation if your budget is not balanced (if cell D42 is anything other than \$0):

APPENDIX C: SCORING RUBRIC

Step 1: Pre-Screening by UWEC Staff/Impact Committee.

PASS/FAIL ONLY - if organization fails this review, they will be notified their application was denied by March 15th. They will not proceed to volunteer review or a presentation. The minimum requirements to PASS include:

- Organization met all Pre-Checklist application requirements
- ALL questions were responded to (N/A is not an acceptable response, except for the 2 questions identified as optional)
- Budget template was completed correctly, with no unexplained deficit or surplus
- Measurement tool and demographic tool both demonstrate the organization’s ability to track required data
- Measurement tool aligns with the selected outcome

Step 2: Community Investment Volunteer Review (only applicants that pass Step 1 will proceed to this step):

Community Investment Volunteers will each conduct an independent, comprehensive, fair and impartial evaluation of their assigned proposals. Each application will be analyzed based on overall responsiveness and qualifications, using the scoring rubric below.

CATEGORY	Strong (10-12 points) Response is clear, compelling, and well-supported with strong evidence. Strong alignment with UWEC’s priorities and mission.	Good (7-9 points) Response is adequate and well-organized but could be stronger in depth or clarity. Alignment with UWEC’s overall priorities and mission.	Fair (4-6 points) Response lacks detail or supporting evidence, making it difficult to fully assess. Weak alignment with UWEC’s priorities and mission.	Weak (0-3 points) Response is unclear, incomplete, or lacks relevance to the question. Little or no alignment with UWEC’s priorities and mission.
Program Information: Statement of Need	Clearly defines the community need, using compelling, recent, and locally relevant data and research to justify the need for programming. Demonstrates deep understanding of the issue and urgency of addressing it. Effectively identifies a condition, underserved community, and/or gap in services, providing sufficient data and research to support the need.	Addresses a condition, underserved community, and/or gap in services, but lacks depth or specificity. Provides some relevant data and research to justify the need for programming, although additional detail or stronger evidence would strengthen the case.	Does not clearly define a condition, underserved community, and/or gap in services. Provides little to no relevant or local data or research to justify the need for programming, making the case for support unclear or unconvincing.	Demonstrates little or no understanding of why the services are needed in the community. Fails to address a specific condition, underserved community, or gap in services. Lacks supporting evidence or data, making the justification for programming unclear or unsubstantiated.

<p>Program Information: Program/Service Overview</p>	<p>Provides a clear, well-developed description including specific goals, activities, and intended outcomes. Activities strongly align with the UWEC Focus Area selected and provide an impactful solution to the demographics and community need described. Clearly describes activities and services accessed by clients. Incorporates strong evidence-based practices or curriculum, demonstrating effectiveness.</p>	<p>Describes the program effectively but may lack clarity in goals, activities or anticipated outcomes. Does sufficient job identifying activities and services accessed by clients. Includes some evidence-based practices or curriculum, but details may be limited. Program activities somewhat align with the UWEC Focus Area selected and may provide a temporary solution to the community need described.</p>	<p>Program is loosely described, with unclear goals or vague activities. Provides some description of services or activities. It is unclear if evidence-based practices or curriculum are used. Program activities have limited alignment with the selected UWEC Focus Area, and the connection to the community need is weak or insufficiently explained.</p>	<p>Lacks a clear program description or does not align with community needs. Provides little to no detail on key services or activities. Program activities have low or no alignment with the UWEC Focus Area selected and do not provide a clear solution to the identified community need.</p>
<p>Organizational Capacity</p>	<p>Organization has a strong history of providing critical services in our community. Demonstrates proven success in managing similar programs and achieving measurable impact. Clearly demonstrates the capacity needed to deliver the proposed program and meet UWEC's requirements.</p>	<p>Organization appears capable of implementing the program. May have some experience in managing similar programs, though the depth of success or impact could be better articulated. Agency is likely to deliver the proposed program and meet UWEC's requirements, but additional clarity on capacity would strengthen their case.</p>	<p>Some concerns about the organization's ability to execute the program effectively. Limited or unclear evidence of success in managing similar programs. Uncertainty around the organization's ability to deliver this program and meet UWEC's requirements.</p>	<p>Significant concerns about the organization's ability to manage the program. Lacks a demonstrated history of success in implementing similar initiatives. Unlikely to have the capacity to deliver the proposed program or meet UWEC's requirements.</p>
<p>Target Population</p>	<p>Clearly identifies the target population and why they are the appropriate focus for this program. Provides detailed demographics and demonstrates ability to capture household</p>	<p>Identifies the target population but lacks depth in demonstrating why this group is the right focus for the program. Proposed service numbers appear reasonable.</p>	<p>Target population is vague, making it unclear who the program is intended to serve. Unclear whether the number of people served is appropriate.</p>	<p>Does not clearly define their target population. It is unclear how many people will be served or whether the program and target population are really aligned with the community needs.</p>

	<p>income/ALICE status.</p> <p>Provides a detailed geographic description.</p> <p>Proposes to serve an appropriate number of people, as related to the cost of services provided.</p>			
<p>Target Population: Client Demographics Tool</p>	<p>Tool clearly captures all minimum demographic information required by UWEC to include age, household income, ALICE status, and city of residence.</p>	<p>Tool captures some of the required demographic information. Some of the information may appear to be "optional."</p>	<p>Tool captures very little of the required demographic information.</p>	<p>Tool does not demonstrate appropriate client demographic collection.</p>
<p>Performance Measure</p>	<p>Outcome selected strongly aligns with the program's goals, activities, and needs identified in the application. The tool is evidence-based and will clearly demonstrate whether the intended outcome is achieved. The outcome measurement method is appropriate for assessing program success and effectively measuring meaningful change for participants. The percentage of clients expected to achieve the outcome is realistic and achievable based on the program's design.</p>	<p>Outcome selected aligns with the program's services described in the application. Performance measurements somewhat align with the program activities, are mostly achievable, and have the potential to effectively measure change in participants. Tool may demonstrate whether the intended outcome is achieved.</p>	<p>Lists vague or loosely defined outcomes, making impact unclear. Tracking methods are insufficient for accurately assessing success. Performance measurements have limited alignment with program activities and may struggle to demonstrate measurable changes in participants. Tool is unlikely to demonstrate whether the intended outcome is achieved.</p>	<p>Selected outcome does not align with the program's described services. Performance measures do not align with program activities, are not achievable, and fail to effectively measure participant change. Tool does not demonstrate whether the intended outcome is achieved.</p>

Program Budget	Demonstrates financial sustainability. Budget is balanced - or if unbalanced, a reasonable, justifiable explanation was provided. The amount requested is appropriate and sufficient in relation to the services and outcomes proposed. Detailed, realistic budget clearly aligns with the program goals and shows that funds will be used efficiently. Reviewer has no concerns about the financial health of the organization or the feasibility of the funding request.	Program demonstrates financial sustainability and is a reasonable funding request for the services provided. Organization may be able to achieve sufficient outcomes with reduced funding. Budget is reasonable and aligned with program goals but lacks some clarity or details. Reviewer may have very minor concerns about financial health or efficiency but no major red flags.	Program demonstrates some financial sustainability and is a somewhat reasonable funding request for the services provided. Budget is vague or does not clearly align with program objectives. Reviewer has concerns about financial feasibility, lack of detail, or utilization of funds.	The program is not financially sustainable. The funding request does not seem reasonable for the proposed services. Budget is unrealistic, unclear, or misaligned with the proposal. Reviewer may have significant concerns about financial health, sustainability, or the ability to effectively utilize funds.
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Step 3: The following sections are scored AFTER the agency's presentation

Presentation	Agency was well-prepared and knowledgeable about the request for funding. Clearly articulated the need for the program and UWEC's investment. Made a compelling case for funding by using storytelling and data to connect with the audience. Presenters were able to answer questions effectively. Time was well-managed, ensuring key points were covered clearly and concisely.	Agency was somewhat prepared and had general knowledge about the request for funding. Articulated the need for the program and UWEC funding but lacked depth or clarity in some areas. Some use of storytelling or impact examples, but the case for support could have been stronger. Presenters answered most of the questions effectively. Time was used efficiently, though some areas felt rushed or underdeveloped.	Agency was not fully prepared or knowledgeable about the request for funding. Did not clearly articulate the need for the program and UWEC funding. Presentation lacked a compelling case. Presenters may have struggled to answer questions clearly. Time was not well-managed, leaving key points underexplained or unfocused.	Agency did not use most of their time, leaving key information unclear or missing. The presentation was unstructured and unprepared, with little evidence of program knowledge. No compelling case was made or unclear justification for funding. Presenters seem very unprepared or unable to answer questions.
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<p>ALICE</p> <p>UWEC PRIORITY</p>	<p>Agency’s programming demonstrates a strong and intentional commitment to supporting ALICE households. Clearly prioritizes reducing barriers and addressing disparities. Program design is purposefully structured to meet the specific needs of ALICE individuals and families. Demographic tool and process clearly capture household income from majority of clients.</p>	<p>Agency’s programming has alignment with supporting ALICE households. Addresses some ALICE clients, but the depth or intentionality of their connection to the program design could be stronger. Demonstrates some effort to reduce barriers, but details could be clearer. Demographic tool and process indicates household income may not be accurately captured from majority of clients.</p>	<p>Agency’s programming has some alignment and commitment to support ALICE households but may lack commitment to reducing barriers. Mentions ALICE but does not provide a detailed impact or sufficient understanding of their unique challenges. Demographic tool and process indicate ALICE status will not be captured for the majority of clients.</p>	<p>Agency’s programming does not align or show commitment to supporting ALICE households. No evidence of efforts to reduce barriers. Demographic tool and process indicate ALICE status is not captured.</p>
<p>Collaboration</p> <p>UWEC PRIORITY</p>	<p>Organization provides clear evidence of established key partnerships and/or networks that enhance service delivery and client outcomes. Demonstrates strong, active collaborations that increase impact through shared resources, expertise, or joint efforts. Clearly describes how partnerships contribute to program success and improve service.</p>	<p>Partnerships are identified or suggested. The potential for collaboration is evident, but details on impact or shared efforts could be stronger. Existing collaborations may not be fully developed. Some partnerships appear beneficial, but details on how they enhance the program are limited.</p>	<p>Partnerships are suggested, but a clear description of the value they bring is missing. Mentions some collaboration, but partnerships are not yet established, or may appear weak, informal, or underdeveloped.</p>	<p>Limited or no partnerships are mentioned. No clear evidence of collaborative efforts, shared resources, or external support. Organization appears to operate in isolation, reducing potential impacts and efficiency. May have only listed other funders.</p>
<p>UWEC Staff</p> <p>Score: Alignment with UWEC’s Priorities (ALICE, Collaboration, Partnership)</p> <p>UWEC PRIORITY</p>				

APPENDIX D: SAMPLE MOU

Please note, we are providing a copy of the 2024-25 Memorandum of Understanding executed by our *current* funded partners. There may be some slight changes in the 2025-26 MOU but at this time, we do not anticipate any *major* changes.

UNITED WAY EMERALD COAST AND AGENCY NAME

MEMORANDUM OF UNDERSTANDING

Community Investment Grant Funding

Grant Period 2024-2025

INTRODUCTION:

United Way Emerald Coast is committed to supporting a comprehensive network of nonprofit agencies that align with our strategic vision and respond to critical community needs in the areas of Health, Education, and Economic Mobility. This agreement clarifies the conditions under which an agency and/or program receives United Way Emerald Coast's financial support. This agreement is written with the goal of assuring that identified human needs are addressed effectively and efficiently, and in the best interest of the community, the Partner Agency, and United Way Emerald Coast. Our goal is to Unite our local community while leveraging resources to impact the lives in Okaloosa & Walton counties.

United Way Emerald Coast pledges responsible stewardship of all donated funds and strives to ensure that the highest standards of accountability are maintained. Any Partner Agency or program receiving United Way Emerald Coast's support is encouraged to seek additional program and administrative support from other sources. Partner Agencies are expected to maintain sustainability and plan for future financial obligations.

AGREEMENT:

This agreement is made and entered between United Way Emerald Coast (herein after UWEC) and AGENCY NAME (herein after Agency). The term of this agreement, unless terminated earlier, in accordance with the conditions of this agreement will be from July 1, 2024 to June 30, 2025.

UWEC has awarded an amount of \$XXX to support the operations of PROGRAM NAME (program name) detailed in the 2024-25 grant application. Funding is contingent upon the Agency's successful operation and achievement of goals, proper use of funds, and availability of funds.

While UWEC does not like to think about funding limitations, it may be necessary to make grant award reductions due to funding limitations or natural disasters. Therefore, this Memorandum of Understanding **cannot constitute a funding commitment** since grant funds are contingent upon pledge fulfillment. This agreement is, however, a statement of our **intent to fund**. Should UWEC find it necessary to adjust grant funding within a grant cycle, UWEC will notify the organization of the Agency thirty (30) days prior to any adjustment.

DISBURSEMENT OF GRANT FUNDS:

Disbursement of funds are contingent on the submission of the Agency's mid-year and final report. These reports are due by their respective deadlines and if submitted late, incomplete, if demographics are reported as unknown for over 20% of your clients, or you have not met all grant agreements, your funding may be withheld until submission/corrections are made and/or it may impact your organization's eligibility for future funding. The grant will be paid out as outlined below:

- July 2024 – 50% of award
- January 2025 – 25% of award (after mid-year report is approved)
- April 2025 – 25% of award

Mid-Year Reports are due and reviewed for accuracy and completion before Q3 and Q4 distributions can be made. If a mid-year report is late by up to 7 calendar days, 20% funding may be withheld from Q3 and Q4 distributions. If mid-year report is late by 8+ calendar days, the Board will convene to determine the penalty which may be no less than 25% of Q3 and Q4 distributions, up to withholding full payments as organization will be seen out of compliance with MOU agreement.

Failure to submit a Final Report on time will jeopardize future grant funding eligibility and/or future payments may be reduced upon the Board's discretion.

SECTION I

The Agency agrees to:

- A. Operate program(s) and expend UWEC funds only as outlined in the application unless subsequent program changes are mutually agreed upon.
- B. Use the reporting template provided by UWEC to submit a minimum of a mid-year and final report by the respective deadlines.
- C. Maintain an accurate accounting record and track disbursement of grant funds. This information will be included in your reports to UWEC.
- D. Provide a success story with each report and, if possible, corresponding photo (and media release) that demonstrates the impact of funds or subsequent services provided. Name and identifying information may be omitted for confidentiality purposes.
- E. Ensure the organization and applicable program service(s) is/are listed in Northwest Florida 211's database and the listing is consistently accurate.
- F. Advise UWEC immediately of any organizational changes which may adversely affect service(s) provided by these funds. Including, but not limited to, change in leadership, service(s), programming, key staff, available resources, etc.
- G. Submit annual partner agency certification paperwork by the respective deadlines.
- H. Identify as a UWEC partner and promote UWEC by following the corresponding guidelines below:
 1. Funded Partners with UWEC investments totaling \$25,000 or more are required to:
 - a. Publish the hyperlinked UWEC logo to your website's homepage.
 - b. Display at the entrance to all your facilities "United Way Community Partner" signage.

- c. Issue at minimum, four social media posts per calendar year, recognizing the financial support and/or partnership with UWEC and tagging @uwemeraldcoast.
 - d. Inclusion of UWEC's logo in your Annual Report.
 - e. Allow UWEC to speak (at least 5 minutes) at your Annual Meeting, annual Volunteer/Donor Appreciation event, or similar mutually agreed upon event and include logo recognition on appropriate materials.
2. Funded Partners with UWEC investments totaling \$10,000 to \$24,999 are required to:
- a. Publish the hyperlinked UWEC logo to your website's homepage.
 - b. Display at the entrance to all your facilities "United Way Community Partner" signage.
 - c. Issue three social media posts per funded year, recognizing the financial support and/or partnership with UWEC and tagging @uwemeraldcoast.
 - d. Inclusion of UWEC's logo in your Annual Report and Volunteer/Donor Appreciation event materials.
 - e. Choose two:
 - i. Facilitate a media release and check presentation photo, announcing UWEC funding.
 - ii. Invite UWEC representative(s) to attend your Annual Meeting, annual Volunteer/Donor Appreciation event, or similar mutually agreed upon event.
 - iii. Issue two (or more) additional social media posts per funded year, recognizing the financial support and/or partnership with UWEC and tagging @uwemeraldcoast.
3. Funded Partners with UWEC investments totaling \$5,000 to \$9,999 are required to:
- a. Publish the hyperlinked UWEC logo to your website's homepage.
 - b. Display at the entrance to all your facilities "United Way Community Partner" signage.
 - c. Issue two social media posts per funded year, recognizing the financial support and/or partnership with UWEC and tagging @uwemeraldcoast.
 - d. Choose one:
 - i. Inclusion of UWEC's logo or name in your Annual Report.
 - ii. Invite UWEC representative(s) to attend your Annual Meeting, Volunteer/Donor Appreciation event, or similar mutually agreed upon event.
 - iii. Issue two (or more) additional social media posts per funded year, recognizing the financial support and/or partnership with UWEC and tagging @uwemeraldcoast.
- I. Participate actively in the annual UWEC fundraising campaign by holding an Employee Campaign or fundraising activity where undesignated donation(s) are requested.
- J. Abide by UWEC policies discouraging self-designations and the promotion of donor designations. When fundraising for UWEC, the Agency is expected to promote the Community Investment Fund, and not promote self-designations either in literature and/or during presentations.
- K. Attend and participate in one of UWEC's ALICE Simulations as well as 2 Partner Agency Roundtable (PART) meetings

to discuss UWEC partnership and key topics related to critical community needs.

- L. Submit an annual Day of Caring project and share additional volunteer opportunities throughout the year.
- M. Submit any changes or redirection in the Agency's approved goals, outcomes, operating budget, and/or overall program in writing on official Agency letterhead to UWEC for consideration. UWEC reserves the rights to renegotiate, adjust, suspend, or cease its allocation of funding to the Agency, and can request further information regarding the proposed changes. All changes will be reviewed by UWEC's Board of Directors.
- N. Spend all funding received from UWEC in accordance with the current term agreement. If funds remain after funding period, the Agency must request, in writing, thirty (30) days prior to the final funding date a funding extension to be reviewed by UWEC Board of Directors. UWEC reserves the right to request the return of all surplus or unused funds remaining after the approved funding period as stated in this agreement.
- O. Acknowledge that the actual amount of funding provided is contingent upon UWEC annual fundraising campaign. UWEC maintains its commitment to fund 100% of the grant award noted in this agreement, but with unforeseen circumstances (such as lower campaign fundraising outcome), funding results may preclude 100% of the funding. The actual award available will be reviewed and determined by UWEC Board of Directors. Agency will receive written notice in the event actual awards differ from the initial award noted in this agreement. Payment of funds to the Agency is subject to reduction or cancellation, in whole or in part, if the Agency fails to carry out activities, in whole or in part, as represented at the time of the request for funds. If the Agency uses funds for purposes other than those for which such funds were intended, UWEC may renegotiate, adjust, suspend, or cease further payment of funds not already paid to the Agency.

During the term of the agreement, the agreed upon grant award may be reviewed for adjustment if exceptional circumstances affect the services being provided by these funds. Should there be a crisis, unforeseen circumstance, or a major change in the Agency's finances, either UWEC or the Agency may request an emergency meeting to discuss the situation. Any change in investment would require approval from UWEC Board of Directors, who reserve the right to determine if said crisis is an exceptional circumstance or not.

SECTION II

UWEC agrees to:

- A. Conduct a comprehensive annual fundraising campaign with Okaloosa & Walton counties.
- B. Act as good stewards over donor dollars by maximizing its resources and supporting agencies that meet critical community needs in the areas of Health, Education, and Economic Mobility.
- C. Identify the Agency as a UWEC Partner Agency and share with the public the broad range of services provided by all partners.
- D. Provide a reporting template for the mid-year and final reports within an adequate amount of time for the Agency to complete by the respective deadlines.
- E. Discuss with the Agency any adjustments necessary, in the event of a campaign shortfall or other financial shortfall during any part of the funding period covered by this agreement.
- F. Ensure Agency is aware of the rationale for funding decision.

- G. Make UWEC's most recently audited financial statements and 990 available on the UWEC website.
- H. Act as a liaison to provide opportunities for Partner Agencies to network, share best practices, and collaborate.
- I. Maintain relationships and build new partnerships across multiple sectors (including nonprofit, government, corporate, and faith based) to identify critical needs and create strategic solutions.

SECTION III

The Agency and UWEC agree to:

- A. Maintain a responsible and representative governing body such as a board of directors that establish financial, administrative, and program policies and procedures.
- B. Maintain books of account to provide adequate financial information on the organization's operations.
- C. Not disparage or encourage others to disparage the organization. For purposes of this agreement, the term disparage includes without limitation comments or statements made in any matter or medium in the press and/or the media about the company which would adversely affect any manner of the conduct of the business of the company, without limitations to the company's business plans or prospects or the business reputation of the company.
- D. Participate in collaborative efforts to promote both UWEC, the Agency, and their collaborative work in the community.
- E. Uphold all terms and obligations mentioned in this agreement.

SECTION IV

In the event of violation by either party of its obligations herein, the other party shall have the right to terminate this agreement upon thirty (30) days written notice. The parties hereby acknowledge UWEC also reserves the right to renegotiate, adjust, suspend, or cease funding to the Agency in the event of a violation of obligations by the Agency set out herein; or in the event of a shortfall in UWEC's anticipated revenue or other financial hardship. UWEC also reserves the right to renegotiate, adjust, suspend, or cease funding to the Agency in the event the approved goals, outcomes, and/or overall program become unachievable, and an alternative cannot be supported by UWEC.

The undersigned acknowledges that a 2024-25 Community Investment Handbook was available with further instructions, guidelines and expectations.

In signing this agreement, the Agency certifies that to the best of its knowledge, it is in compliance with all federal, state, and local government regulations pertaining to its operations, and is currently eligible to receive tax deductible contributions in accordance with IRS regulations. In the event the Agency determines or is notified that it is not in compliance with federal, state, or local government regulations, or is no longer eligible to receive tax deductible contributions under IRS guidelines, the Agency will notify UWEC of said non-compliance immediately and UWEC reserves the right to renegotiate, adjust, suspend, or cease funding to the Agency.

This Memorandum of Understanding, upon its approval by both UWEC and the Agency, shall supersede any previous Partner Agency agreements executed between UWEC and the Agency.

The term of this agreement, unless terminated earlier, in accordance with the conditions of this agreement will be from July 1, 2024 to June 30, 2025.

APPENDIX E: SAMPLE REPORTING TEMPLATE

Please note, we are providing a copy of the 2024-25 Reporting Template being used by our current funded partners (there are 4 sections). There may be some slight changes in the 2025-26 Reporting Template, including offering online submission, but at this time, we do not anticipate any *major* changes.

UNITED WAY EMERALD COAST July 2024 - June 2025 Community Investment Grant Semi-Annual Report

Semi-annual reports are due to United Way Emerald Coast on the following dates at **5:00 PM**:
Mid-Year (July 1 - Dec. 31): due by January 17, 2025
Final (Jan. 1 - June): due by June 20, 2025

Instructions:

- When submitting this report, it must remain in Excel format and **may not be converted to PDF**.
- You must provide a response to every cell shaded in light green, or provide an explanation as to why you were unable to capture that info.
- To submit photos and media releases please attach them to the email when submitting this report.
- You may not update any data previously reported without consulting UWEC first.
- You are encouraged to review your MOU periodically to ensure you are meeting all grant requirements and expectations.
- If your report is late, incomplete, or you have not met all grant agreements, your funding may be withheld until submission/corrections are made and/or it may impact your organization's eligibility for future funding.

UWEC wants to see you succeed! If you have any questions, or if there is anything we can do to be a better partner, please contact Aubrey Robbie, Director of Impact at aubrey@united-way.org or 850-812-3386.

SUBMIT THIS REPORT TO VOLUNTEER@UNITED-WAY.ORG BY THE DEADLINES LISTED ABOVE

Agency Name: _____

Program Name: _____

Point of Contact:		Email:	
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	Mid Year (Jul-Dec)	Final (Jan-June)	Amount Remaining
Amount Awarded:	<input type="text"/>	<input type="text"/>	\$ -
Amount Expended:	<input type="text"/>	<input type="text"/>	

NARRATIVE REPORT

II. Is your Panhandle 211 profile current? Contact resources@uwwf.org to update.

Mid-Year

Final

IV. Has someone from your leadership team participated in a UWEC non-profit capacity building opportunity?

Mid-Year

Final

Please provide an explanation if your response was "no."

Please provide an explanation if your response was "no."

VI. Please submit any volunteer opportunities you would like us to share with individuals & companies.

Mid-Year

Final

VII. Please provide a client success story. Name/identifying information may be omitted. Please make sure you obtained a media release.

Mid-Year

Final

VIII. Is there any additional information you would like to share with UWEC?

Mid-Year

Final

DEMOGRAPHIC REPORT

Annual Projected # Clients Served: _____
 Total Unduplicated Clients Served Mid-Year: _____
 Total Unduplicated Clients Served Final: _____
 Annual Total # Clients Served: **0**

THE TOTAL VALUE CALCULATED IN EACH SECTION SHOULD BE THE SAME NUMBER AS YOUR TOTAL UNDUPLICATED CLIENTS SERVED ENTERED ABOVE!

Area of Residence	Mid-Year	Final
North Okaloosa		
South Okaloosa		
North Walton		
South Walton		
Other County		
Prefer not to say		
Unknown**		
TOTAL*	0	0

Income	Mid-Year	Final
At/below ALICE threshold		
Above ALICE threshold		
Prefer not to say		
Unknown**		
TOTAL*	0	0

Age	Mid-Year	Final
Children (18 & under)		
Adults (19-64)		
Seniors (65 & older)		
Prefer not to say		
Unknown**		
TOTAL*	0	0

Military Status	Mid-Year	Final
Veteran/Active Duty		
Not a Veteran/Active Duty		
Prefer not to say		
Unknown**		
TOTAL*	0	0

Military status is preferred not required. Please indicate below how many client(s) reside in a household with an active duty member/veteran.

**Please provide an explanation if "unknown" represents more than 20% of clients served in any of the categories above. Please explain how you plan to capture this required data for the final report.

MID-YEAR: Please provide an explanation if the clients served are less than 50% of the annual projection; also include your plan to reach the goal by year-end.

FINAL: Please provide an explanation if the clients served are less than 90% of the annual projection.

Performance Measurements

I. CLIENT INFO

Do your numbers below represent duplicated or unduplicated clients? You are encouraged to track unduplicated clients, if possible.

III. PROGRAM OUTCOME DATA

Outcome(s)	Projected Clients Served Annual Total	Projected Achieving Annual Total	# Served (Jul-Dec)	# Achieving (Jul-Dec)	% Achieving (Jul-Dec)	# Served (Jan-June)	# Achieving (Jan-June)	% Achieving (Jan-June)	# Served Annual Total	# Achieving Annual Total	% Achieving Annual Total
#% of students served who improve/maintain academic performance, achieve developmental milestones, or develop new skills					#DIV/0!	0		#DIV/0!	0		#DIV/0!
#% of adults who are prepared for post secondary education or employment					#DIV/0!	0		#DIV/0!	0		#DIV/0!

IV. PROGRAM OUTPUT & OUTCOME NARRATIVE

MID-YEAR: Please provide an explanation if the % achieving is less than 40%; also include your plan to raise the achievement rate by year-end.

FINAL: Please provide an explanation if the cumulative % achieving is less than 75%.

APPENDIX F: FREQUENTLY ASKED QUESTIONS (FAQ)

How do I know if our program is eligible to apply?

Please use these questions to determine your eligibility: is your organization located within Okaloosa and/or Walton counties, are the program participants and program services delivered within Okaloosa and/or Walton counties, does the program align with one of UWEC's three focus areas and required outcomes?

What are UWEC's focus areas?

UWEC has three focus areas: Healthy Community, Youth Opportunity, and Financial Security.

How do I know if I should apply under Healthy Community, Youth Opportunity, or Financial Security?

You should review focus area statements available online at <https://www.united-way.org/our-impact>. You should select the area with which you most closely align.

How many grants can I apply for?

UWEC allows agencies to submit one application for funding each cycle.

What is the funding period for this grant?

The funding period for this grant is July 1, 2025, through June 30, 2026. If funded, awards will be paid out in the following manner: 50% paid in July, 25% paid in January (or upon approved mid-year report), and 25% paid in April.

What is the maximum amount I may ask for?

UWEC has a few large fundraising campaigns that do not report until the spring so unfortunately, we do not yet know the amount we will be able to award. We hope to award between \$450,000 – 525,000 through this funding opportunity. In 2024-25, funding awards were between \$3,500 and \$43,680 with an average grant amount of \$18,077. It is very unusual for UWEC to award \$40,000+ to any single applicant. UWEC may fully fund or partially fund program requests.

What will UWEC fund?

UWEC invests in programs with measurable outcomes that align with our priorities. United Way Emerald Coast recognizes that non-profit organizations themselves are best positioned to determine where grant dollars will have the greatest impact. To support applicants in achieving their missions more effectively – and to encourage innovation, flexibility, and sustainability – 2025-26 Community Investment Grant awards may be unrestricted.

What won't UWEC fund?

UWEC will not fund requests for: contributions to endowments, subcontract agreements, lobbying efforts, capital campaigns, construction or plans to occur outside of the funding period, direct religious activities, debt reduction, stipends to individuals, fundraising events, and/or programs/services located outside of our territory.

Will United Way fund new programs?

Yes, UWEC invests in new, existing, and expansions to existing programs. As long as agencies provide compelling, data driven proposals describing the evidence-based need for the proposed program within the community, and the program aligns with one of UWEC's focus areas, UWEC will consider funding it.

Will United Way consider proposals from agencies who do not currently receive funding?

Yes. This is an open investment process for all of UWEC's Partner Agencies. An agency that has not received UWEC funding previously is invited to submit a proposal for a Community Investment Grant.

Will funding for programs who received funding in the 2025-26 grant cycle get cut?

All applications are zero-based. Funding in *any* prior grant cycle does not guarantee funding in any future grant cycle. Organizations may consider applying for funding for the program again in the following year. Historically, there are more requests for funding than there are resources available. In reviewing proposals, grant panelists will face difficult decisions and determine which requests align most closely with UWEC's priorities.

Who is ALICE?

ALICE refers to the population in our communities that are **Asset Limited, Income Constrained, Employed**. The ALICE population represents those among us who are working, but due to childcare costs, transportation challenges, high cost of living and so much more are living paycheck to paycheck. To achieve lasting change, we must first understand the population of families that are working hard but falling short in our communities. Visit www.united-way.org/alice or <https://www.uwof.org/alicer> to learn more.

Who reviews the grant proposals?

UWEC's Community Investment process is a volunteer led review process. Community members from various industries and backgrounds volunteer as grant panelists. They review grant proposals, score presentations, deliberate, and provide funding recommendations to UWEC's Board of Directors.

What should I prepare for the presentation?

You will be assigned a 30-minute window for your presentation; this allows for a 20-minute presentation and 10-minute Q&A session. All presentations are held at UWEC's main office (112 Tupelo Ave SE in FWB). Your audience will include the Community Investment Volunteers who are evaluating *all* the applications in your Focus Area. There will probably be between 10-20 volunteers assigned to your Focus Area. They have already read and scored your application. You should use this time to highlight the request for services, explain your alignment with UWEC's priorities, how you will measure success, and any other information you think will strengthen your request. Feel free to share a client story or bring marketing collateral that is relevant to your request. The room is equipped with basic AV equipment; if you would like to share a presentation or video, you should send it to UWEC staff *at least the day before your presentation*. Please note, we are not responsible for technical failures, and you should be prepared with a backup plan in case technology fails. UWEC staff will also be in the room to help you stay on time and to monitor your presentation.

What if I have a conflict with the presentation date?

Your organization is required to present your request to our volunteers on that day. We do not have an alternative make-up date. Consider training and preparing someone else from your team as early as possible – this may be a co-worker, board member, or key volunteer.

Where can I find reliable and relevant data to support our grant request?

We're so glad you asked!

- **United Way of Florida's ALICE Report!!** www.united-way.org/alice or www.uwof.org/alicer
- **Local school districts and/or state education agencies** – for district, school, and student data; best sources for current, local educational information including school/district demographics, per pupil expenditures, school quality, student achievement and performance, and school accountability information.
<https://www.fldoe.org/accountability/data-sys/edu-info-accountability-services/pk-12-public-school-data-pubs-reports/index.shtml> or <https://www.walton.k12.fl.us/> or <https://www.okaloosaschools.com/>
- **National Center for Education Statistics** – comprehensive repository of national education data including topics in early childhood, K-12, and post-secondary and often disaggregated by race, income level, gender and geography.
<https://nces.ed.gov/>
- **National Assessment for Educational Progress** – commonly referred to as the Nation's Report Card; access national student performance data for key grade levels in core subject areas, including reading, mathematics, and disaggregated by race, income level, gender, and geography. <https://nces.ed.gov/nationsreportcard/>
- **U.S. Department of Education** – main access point for information and data on a wide range of educational issues, including early childhood, K-12 and post-secondary. In addition to linking to key data warehouses like NCES (see

above), the site contains information on federal education grants, regulations and policy guidance, and student loans (Pell Grants). <https://www.ed.gov/>

- **Measure of America** – provides annual data on the prevalence of disconnected youth in the United States (i.e. the number and percent of youth ages 16-24 neither in school or working); including reports highlighting disparities, and an interactive tool that can be used to visualize the extent of the problem by geographical area. <https://measureofamerica.org/>
- **Pew Research Center** – social and demographic trends, economic mobility, and technology impacts. <https://www.pewresearch.org/>
- **Kids Count Data Center** – Annie E. Casey Foundation’s Data Center annual compiles key data to highlight the well-being of children and youth in the United States, which is published in the KIDS Count Data Book; the data book indexes and ranks child well-being by state based on a set of indicators across four domains: education, health, economic well-being and family/community. <https://datacenter.aecf.org/>
- **Education Trust** – provides data, research, reports, and policy analysis to advocate for equitable access to a quality education for all students; interactive data tools can be used to understand the current state of educational practice, outcomes and the prevalence of racial inequities by state, including college completion, access to early childhood education, access to advanced, college prep coursework, and teacher diversity and quality. <https://edtrust.org/>
- **Urban Institute** – provide research reports, briefs, and fact sheets on key issues in childcare, early childhood education, K-12, and postsecondary education. <https://www.urban.org/>
- **County or State Health Departments** – Community Health Needs Assessments, local Behavioral Risk Factor Surveillance System reports, Vital Records data including births, deaths, marriages, and domestic partnerships. <http://www.flhealthcharts.gov/> or <https://www.countyhealthrankings.org/> or <https://okaloosa.floridahealth.gov/> or <https://walton.floridahealth.gov/>
- **Centers for Disease Control and Prevention** – Behavioral Risk Factor Surveillance System, Morbidity and Mortality reports, Healthy People 2020, National Center for Health Statistics, data and statistics by topic area. <https://www.cdc.gov/>
- **US Census Bureau** – develops the yearly American Community Survey which provides details on a variety of topics across the areas of social, economic, housing, and demographic. <https://www.census.gov/programs-surveys/acs>
- **Feeding America’s Map the Meal Gap** – food insecurity rates by state and county. www.feedingamerica.org/research/map-the-meal-gap
- **Florida Department of Children and Families (DCF)** – child welfare, foster care, and assistance program statistics <https://www.myflfamilies.com/>
- **U.S. Department of Agriculture’s Economic Research Service (USDA)** – provides a number of tools related to food security and access. <https://www.ers.usda.gov/topics/food-nutrition-assistance/food-security-in-the-us>
- **Health Resources and Services Administration** – focuses on data related to geographically, isolated, economically, and medically vulnerable populations. <https://data.hrsa.gov/>

- **County Health Rankings and Roadmaps** – provides data about multiple factors that influence health and increase health equity, measures the health of nearly every county in all 50 states. <https://www.countyhealthrankings.org/>
- **Hope Initiative** – resource that tracks state level social determinants of health and health outcomes by race, ethnicity, and socioeconomic status. <https://www.hopeinitiative.org/>
- **Bureau of Labor Statistics** – for data on employment, unemployment, wages, benefits, employment projections and characteristics of the U.S. workforce. <https://www.bls.gov/>
- **Florida Chamber Foundation’s Prosperity Project** – focuses on childhood poverty, workforce readiness, and economic mobility. <https://www.flchamber.com/ProsperityFL/> or <https://thefloridascorecard.org/> or <https://www.flchamber.com/floridagapmap/>
- **Prosperity Now** – provides data, strategies, and tools to advance policies and practices to advance economic mobility; contains resources focused on addressing the racial wealth gap. <https://prosperitynow.org/>
- **FDIC** – Conducts a biannual survey of American households use of banking and other financial services, good source of information on access to and disparities in mainstream financial products. <https://www.fdic.gov/>
- **Federal Reserve Bank of Atlanta** – contains resources including blog posts, webinars, and issue briefs on economic inequality and the correlation of demographic characteristics with wealth; also see the Federal Reserve’s Benefits Cliffs. <https://www.atlantafed.org/research> or <https://www.atlantafed.org/economic-mobility-and-resilience/advancing-careers-for-low-income-families/what-are-benefits-cliffs> or https://emar-data-tools.shinyapps.io/prd_dashboard/
- **Florida Housing Data Clearinghouse** – affordable housing needs and cost burden data. www.flhousingdata.shimberg.ufl.edu
- **National Low Income Housing Coalition (NLIHC)** – affordable housing reports and rent affordability data. <https://nlihc.org/>

If you have any further questions, please contact Darra Flanagan, Director of Impact at darra@united-way.org or 850.920.2299