



United Way
Emerald Coast

COMMUNITY IMPACT GUIDELINES

For the funding cycle beginning 7/1/2024 and ending 6/30/2025

APPROVED FEBRUARY 2024

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BEFORE YOU BEGIN

United Way Emerald Coast (UWEC)'s Community Investment (CI) guidelines are meant to give a detailed overview of who we are and how our CI process works. It includes requirements on eligibility, reporting, and programmatic focus. You should read each section carefully, as we have tried to be detailed in our instructions and to anticipate the most frequently asked questions about our certification and grantmaking priorities.

The first sections of the document contain information relevant to all applicants, with details pertaining to specific funding streams found at the end. In the Appendices, you'll even be able to preview the questions asked in our application. Our goal was to provide easily accessible resources to set up each applicant with a clear understanding of eligibility guidelines, funding priorities, and the application process.

This is a digital document and contains many hyperlinks to outside resources and materials that help give a broader view of our work in the community and how we collaborate with our strategic community partners. To follow the links, hover over them and follow the prompt.

While not a replacement for this guide, we want to acknowledge valuable resources that could be helpful during this process. In addition to the links included in the document, we invite you to review the following:

- [Community Investment Webpage](#)
- [Grant Training Video](#)
- [Partner Agency Certification Checklist](#)

This handbook supersedes all previously issued handbooks and any inconsistent policy statements or memoranda made in the past. With or without prior notice, UWEC reserves the right to revise, modify, delete, or add to any and all policies, procedures, or benefits stated in this handbook or in any other related document.

Questions and clarifications about the investment process are welcome and should be directed to Aubrey Robbie, Director of Impact, at aubrey@united-way.org.

Contact Information: CI Staff

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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.

DEI STATEMENT

United Way Emerald Coast (UWEC) seeks to mobilize all people to improve lives and create a community where everyone has the opportunity to achieve their full potential. We value and acknowledge the visible and invisible qualities, backgrounds, and limitations that make up our diverse community and we strive not only to improve access but to prioritize diversity, equity, and inclusion practices at the center of our daily work. Together, United, we will more effectively provide the access, opportunity, and support needed for the advancement of all people.

SERVICE AREA

Okaloosa and Walton counties, Florida

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 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.

COMMUNITY INVESTMENT VOLUNTEERS

These volunteers make a financial gift to UWEC. They serve on a panel aligned with a focus area (either health, education, or economic mobility); they review grant applications within their focus area, participate in presentations by the applicants, and make funding recommendations to UWEC's Board of Directors.

OVERVIEW

UWEC envisions a community where everyone has the opportunity to achieve their full potential. Our focus is on health, education, and economic mobility because these are the building blocks for a good quality of life. To build a strong, equitable community, we must support policies and programs that improve lives and empower families to succeed.

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.

Demographic Priorities

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, 42% 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 financial gaps for those living below the ALICE threshold.

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

EQUITY:

UWEC is developing a better understanding of the challenges our community faces when it comes to inequities. These inequities contribute to the disparities we see in the areas of health, education, and economic mobility, and will continue to hold us back from being a community where every person has the opportunity to achieve their full potential. We acknowledge that we do not have all the answers, but we have the opportunity and obligation to actively listen, reflect, learn, act, and encourage others to do so as well.

We advocate for diverse, equitable, and inclusive practices and programs that unite, rather than divide.

Achieving equity will require an intentional effort to identify and remove systemic, institutional, and historical barriers for members of our community, our employees, our volunteers, and our partners. UWEC is committed to leveraging our assets and relationships toward a more equitable community.

Please consider inequities in your proposal and to the extent possible, draw connections to your proposed project and your ability to intentionally support marginalized and disenfranchised groups.

Impact Approach

UWEC is committed to creating the best possible version of our community. We recognize that funding alone cannot solve deeply rooted community issues. Our strategy at UWEC is to provide funding to innovative 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 best support an 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. We are moving beyond just a fundraising entity and becoming a leader in identifying and solving the problems in our community... United.

We prioritize our role as a collaborator and convener. Our ability to fund good work is tied directly to our ability to fundraise by telling the story of collective impact across our own programs and those with whom we partner.

Partners 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:

1. Internally managed initiatives and programs
2. Community partnerships, trainings, and volunteer placement
3. Funding programs that align with our impact goals

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.

ReadingPals: Early literacy initiative focused on increasing literacy rates in VPK through 3rd grade children.

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.

Corporate Volunteerism: Team building activities that serve to reinforce an organization's dedication to giving back to our community.

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.

Project LEAD: Program that prepares emerging and current leaders for leadership roles on nonprofit and public sector boards and committees.

Women United: Powerful network of diverse, driven, and passionate women focusing on inspiring and empowering others through fundraising, advocacy, volunteerism, professional development, and networking.

Emerging Leaders: Donor network of young professionals taking collaborative action in philanthropy, volunteerism, and leadership development.

Day of Caring: Annual day of community service where UWEC mobilizes hundreds of volunteers.

211 of Northwest Florida: A 24/7 toll-free, confidential hotline that connects individuals with resources.

SingleCare: Free prescription drug discount card.

Born Learning Trail: Interactive trail that turns a trip to the park into an active learning experience, helping children develop skills for school readiness.

Stuff the Bus: Annual school supply drive ensuring that every local child has the tools necessary to be successful in school.

COALITIONS/COLLABORATIONS

Partner Agency Round Tables (PART): Opportunities to network and collaborate with other nonprofit leaders.

Nonprofit Trainings (NPT): Trainings geared towards supporting local professionals in the nonprofit sector.

GRANTS

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

Emergency Food & Shelter Program (EFSP): Federal funding allocated to local nonprofits 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: Funding provided during response and recovery efforts associated with major disasters and emergencies.

Other grant opportunities may be available depending upon UWEC's fundraising efforts.

BECOMING A PARTNER AGENCY

UWEC is interested in partnering with the most efficient, effective, and innovative non-profit agencies in Okaloosa and Walton counties. A Partner Agency is a non-profit organization that has an ongoing relationship with UWEC, is certified annually and adheres to United Way standards described in this manual. UWEC's non-profit Partner Agencies must meet a strict set of eligibility criteria. This provides assurance to our donors, sponsors, and supporters that UWEC's Partner Agencies meet the highest standards of financial transparency, governance, and accountability.

UWEC and Partner Agencies are allies in meeting health and/or human service needs. All Partner Agencies are encouraged to share their expertise with each other for the betterment of all.

Term: Our partnership year runs from January 2024 through at least December 2024.

Benefits: Partner Agencies have access to funding opportunities, resources for outreach and promotion, and learning opportunities to support their mission, garner new advocates and increase their effectiveness in the community. Benefits may be found by visiting www.united-way.org/certification.

Eligibility: The Partner Agency Checklist describes all the requirements for a partnership with UWEC.

Review: As part of the application, each agency is asked to upload organizational and financial documentation. Volunteers will review these applications and evaluate programming to help UWEC gauge the financial health and sustainability of applicant agencies to ensure good stewardship of donor dollars. They look for:

- Internal accounting controls over our funds. Do you have systems and safeguards in place?
- Evidence that UWEC is not the primary funder for your organization.
- Evidence of the economic mobility of your agency.
- A strong fiduciary and governing leadership body who steers the organization.

AGENCY AUTONOMY AND ACCOUNTABILITY

The public has entrusted UWEC with financial contributions and donors have a right to expect the highest professional standards from each Partner Agency. 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 the donors who contribute undesignated gifts to UWEC. The objective of the CI process is to deploy financial support to maximize the resources available for high quality human service programs that impact the most urgent needs of the community.

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 outcomes. While many nonprofits 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.

Geographic area: Partners should have a physical location within the UWEC service area. Partners must provide services to individuals residing within Okaloosa and/or Walton counties. Partners may have an address outside of the UWEC service area as long as they can demonstrate an authentic connection to the local community.

Special consideration will be given to programs that *intentionally* reduce barriers to accessing resources (by providing transportation, childcare, meals etc.), provide services in the areas with the highest percentages of ALICE households, target underserved/high need populations, are working to advance equity, and/or are working collaboratively with UWEC and other partners to provide services.

Priority will be given to applications that demonstrate an understanding of and directly address inequities, economic disparities and/or opportunity gaps.

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) partnership with UWEC.

Applications for CI funding are accepted from February 27, 2024 to March 26, 2024 at 5PM through UWEC’s online portal (www.united-way.org/2024_grant). A Partner Agency may submit ONE application for funding each cycle.

Applicants will be notified of grant decisions by June 28, 2024. If selected for funding, the grant period will begin July 1, 2024 with a final report due by June 28, 2025.

Every year, the Community Investment team collects feedback from agencies, volunteers, and donors, and implements changes based on what is learned. There are several changes this year:

1. Partner Agencies may submit no more than one application for funding
2. Heavier weight on partnership score (participation in PART, NPT, programs/initiatives, co-branding, meeting MOU & reporting requirements, etc.)
3. Heavier weight on organization’s alignment with UWEC’s equity efforts

FOCUS AREAS

We strive to see results by working through various agencies, programs, and community partnerships focused on three community priorities. UWEC believes that focusing our funding and directing our efforts in these priority areas will make the greatest difference in the lives of people in Okaloosa and Walton counties. These three priorities are described below.

Focus Area	Goal	Sample Outputs	Results
Health	Individuals are able to improve/maintain their health and independence.	<ul style="list-style-type: none"> # volunteers participating in the program # volunteer hours supporting the program # of (insert item – books, meals, hygiene kits, etc.) distributed 	<ul style="list-style-type: none"> ##% individuals who develop essential life skills, increase social support, and/or improve capacity for independent living ##% of individuals who demonstrate improvement in their daily functioning ##% of individuals with increased food security and/or who moved towards a healthy weight
Health	Adults and youth understand the dangers of risky behaviors, avoid	# of hours of tutoring/academic assistance provided	##% of individuals served who are able to live in a safe(r) environment where the risk of abuse, violence, and/or trauma is minimized

	them, and know how to protect themselves from harm.	# of classes held # of individuals screened for benefits # of outreach activities conducted	#% of individuals who gain knowledge by participating in support groups and/or completing a recovery program #% of people who changed their behavior to engage in safer practices
Health	Families and individuals are able to access quality affordable healthcare, preventative care, and behavioral health services.	# of classes/trainings offered # of nights of safe shelter	#% of individuals served who improve or maintain their physical or dental health #% of individuals who show an increase in resiliency or improve their emotional, mental, and/or social health
Education	Students are in age and/or developmental appropriate programs that support academic success and development.		#% children meeting development milestones (birth to 5 year-olds) #% of children/teens with special needs who meet their goals #% of students served who improve or maintain academic performance, complete program requirements, and/or demonstrate proficiency in benchmark/assessment tests
Education	Students are equipped with the skills and resources they need to succeed in school and life.		#% of students who demonstrate gains by receiving support services (e.g. mentoring, tutoring, counseling) #% of students served who gain new knowledge or develop skills (i.e. social skills, life skills, soft skills, leadership skills, emotional development skills)
Education	Individuals have the education and skills to obtain and retain household-sustaining jobs.		#% of students who are prepared for education, enlistment, or employment #% of individuals who complete a job internship/apprenticeship, post-secondary degree, certification and/or training to meet their career needs
Education	Families are prepared to support student success and/or the development of their children.		#% of caregivers who demonstrate an appropriate knowledge of (co-)parenting skills and/or engagement in their child's development #% families utilizing resources to support student success and/or early learning at home
Economic Mobility	Increase financial stability and advance economic mobility.		#% of individuals who gain employment, achieve career advancement, or increase wages

			<p>## of individuals who improve financial situation by accessing economic supports (ie. EITC, SNAP, FAFSA, home buyer credits, legal supports)</p> <p>## who improve financial strength by learning new behaviors (ie. budgeting, reducing debt, increasing savings, opening a bank account)</p> <p>## who are able to remain in the workforce by accessing supportive resources</p>
Economic Mobility	Families and individuals are able to meet basic needs and/or navigate when disaster strikes.		<p>## Households linked with community resources to increase self-sufficiency through case management support</p> <p>## of individuals that access or maintain permanent, affordable housing</p> <p>% of individuals report needs met after facing housing emergency or other crises</p>

COMMUNITY INVESTMENT GRANT GUIDELINES

CI grants are possible through our fundraising efforts, largely conducted with local companies running Workplace 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 2024.

We expect to award between \$325,000 - \$400,000 through this funding opportunity. Last year, grants were awarded between \$5,000 and \$32,411 with the average grant amount of \$16,522. 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 of Health, Education, or Economic Mobility and provide measurable outcomes.
4. All programs must demonstrate 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 promote equity and/or focus on eliminating disparities by intentionally targeting high need populations.
7. Minimum request for funding is \$5,000.
8. 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.
9. 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.
10. UWEC reserves the right to adjust program and application guidelines.

11. 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 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

APPLICATION PROCESS TIMELINE

Workshops (strongly recommended): February 20 or 22, 2024

Application Opens: February 27, 2024

Application Closes: March 26, 2024

Site Visits/Presentations: April 15 – April 18

Award Notification: June 28, 2024

Grant Period: July 1, 2024 – June 30, 2025

Payments: 50% of funding on or before July 29, 2024; 25% on or around January 2025 (after mid-year report is submitted and approved); 25% on or around April 2025

ENFORCEMENT

A violation of Partner Agency policies will be reported to the Chair of UWEC's Impact Committee. The Impact Committee Chair will meet with the 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.

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 Grant Training workshop.
3. Submit Grant Application on or before March 26, 2024 at 5pm (no extensions).
4. Pre-Screening: Applications submitted will be reviewed by the Impact Committee to determine 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. Minimum eligibility requirements can be found on Appendix A.
5. Volunteer Review: If the application passes the pre-qualification, 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.

6. 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 and other capacity building opportunities, 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.
7. Presentations: Partner Agencies will familiarize CI volunteers with the agency's mission, day-to-day program activities, and the specifics of the grant request through an oral 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.
8. 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.
9. Board Approval: CI Chair will present recommendations to the UWEC Board of Directors for final approval.
10. Award Notifications: UWEC's President & CEO will reach out to all applicants to notify them of the funding decision.
11. Grant Payments: All funded programs will receive their first grant payment (6 months of funding) on or before July 29, 2024; 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 2025 (25%) and April 2025 (25%). Exact payment dates and expectations will be included in the MOU available in June 2024.

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. Grouping the majority of clients into an "unknown" category 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 2024 that will outline all expectations for funded partners, including reporting requirements. A sample MOU may be found on Appendix B.

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 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. [Sample Reporting Template](#)

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. In particular, 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 assisting 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, in particular, are expected to actively co-brand with UWEC and recognize UWEC in the same manner that they would a corporate sponsor (when and where appropriate). The following *minimum* expectations are outlined below, based on the annual funding amount, and will also be outlined in the MOU agreement:

- A. 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 on your Annual Report.
 - e. Facilitate a media release and check presentation photo, announcing UWEC funding.
 - f. 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 on your Annual Report.
 - 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 on your Annual Report
 - ii. Facilitate a media release and check presentation photo, announcing UWEC funding
 - iii. Invite UWEC representative(s) to attend your Annual Meeting, Volunteer/Donor Appreciation event, or similar mutually agreed upon event
 - iv. Issue two (or more) additional social media posts per funded year, recognizing the financial support and/or partnership with UWEC and tagging @uwemeraldcoast.

COMPLIANCE

UWEC will provide your organization with logos as well as a marketing guide/toolkit with sample messaging you may choose to use. In order to maintain the integrity of the United Way brand, the United Way 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 loss of funding and/or impact eligibility for future funding and will be at the discretion of UWEC's Board of Directors.

SUPPORT OF THE CAMPAIGN

UWEC seeks to maximize the total dollars available to address the needs of our community. UWEC encourages Partner Agencies to develop additional revenue generating activities that will help meet the health and human service needs of our community. In brief, support of the campaign by agencies includes but is not limited to the following:

- Running a campaign among the agency's employees and/or Board of Directors to solicit undesignated contributions;
- Participating in the distribution of campaign materials and speaking with businesses as requested during the campaign and actively promoting UWEC;
- Partner agencies are prohibited from promoting designated gifts in UWEC campaigns.

TERMINATION OF PARTNERSHIP STATUS

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

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

- provision of poor quality service;
- nonperformance or inability to meet program goals for a United Way Funded Program;
- poor accountability of funds;
- failure to communicate or respond in a timely manner;
- decision not to participate in required meetings;
- decision not to provide reports of outcomes or success stories; or
- decision not to inform UWEC of program changes

PROCESS

Once concerns are raised about the Partner Agency's compliance with applicable policies and procedures, the Board of Directors will examine the situation. UWEC's Board of Directors will notify the Partner Agency in writing of United Way's concerns and may request a meeting with Partner Agency representatives, including appropriate Partner Agency staff and Board members.

During this meeting, the Board of Directors will explain UWEC's concerns and hear the Partner Agency's responses. A remediation or compliance plan and a timetable for remedying identified problems, deficiencies, or concerns will be developed by the Board and the Partner Agency. The Board will communicate in writing the remediation or compliance plan to the Partner Agency.

If the Partner Agency does not comply with the provisions of the plan, fails to submit the appropriate documentation, or is unable to reach the agreed upon outcomes within the established time period under the remediation or compliance plan, the Board of Directors may place the Partner Agency on probation, which may include a reduction or suspension of its grant/designation payments.

Termination of partnership shall be considered if the Partner Agency fails to take positive remedial actions to satisfy the identified problems, deficiencies, or concerns. In the event termination action is warranted, the Partner Agency will be notified in writing.

UWEC reserves the right to expedite this process and terminate the relationship without advance notice in the event the Agency fails to meet its obligations as described in the Annual Partner Agency Review, or in the event of fraud or criminal activity by an Agency, its officers or its employees.

AGENCY-INITIATED TERMINATION

A Partner Agency may terminate its United Way Partner 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 Agreement for any reason, the Partner Agency must cease use of all United Way logos and materials that identify the Agency as a United Way Partner Agency.

NOTE OF THANKS

We value our partnerships with other local non-profits. Your work is critical to the health and wellbeing of Okaloosa and Walton counties. We thank you for considering United Way Emerald Coast as a partner in your important work.

UNITED WAY EMERALD COAST

2024-25 PARTNER AGENCY CHECKLIST

Nonprofit organizations are eligible to apply as a Partner Agency if able to answer “Yes” to ALL the criteria below. If your organization does not currently meet the criteria below, but you would like to receive updates on nonprofit trainings and other opportunities, please contact Aubrey Robbie at aubrey@united-way.org.

1. Does your organization comply with all federal, state, and local laws and regulations and are you current with all required filings?
2. Does your organization offer programs/services within Okaloosa and/or Walton counties?
3. Does your organization agree to use all United Way funds and donations in compliance with all applicable anti-terrorist financing and asset control laws, statues, and executive orders?
4. The organization does NOT discriminate against any person or group of people in its hiring and employment practices, codes of conduct, programs, services, or in any other aspect of its operations.

If your organization is eligible, you will be asked to provide the following documentation for the 2024-2025 Partner Agency Application. You can start your application on our website at <https://www.united-way.org/certification>.

_____ **IRS Determination Letter verifying 501(c)3 status (Required by New Certification Applicants only or if any changes have been made since last submission)**

One-page letter that indicates that the organization is tax exempt under 501(c)3 of the Internal Revenue Code.

_____ **Florida Charitable Solicitation Registration**

This is a one-page document from the Department of Agriculture and Consumer Service that has the CH# and expiration date. This form is renewed annually and is required if any charitable organization intends to solicit contributions. If your organization is not required to file a Florida Charitable Solicitation Registration, please upload a letter from the Florida Department of Agriculture and Consumer Service explaining the exemption.

_____ **Florida Consumer’s Certificate of Exemption (Form DR-14)**

This is a one-page document from the Florida Department of Revenue which makes charitable organizations eligible for sales tax exemption. This form is renewed every 5 years, and the most recently renewed certificate should be submitted.

_____ **Sunbiz “Document Number” verifying Active Status**

The Sunbiz “Document Number” can be found by searching your organization’s legal name at <https://dos.myflorida.com/sunbiz/search/>.

_____ **Most recently filed IRS Form 990, 990-EZ, or 990-N**

This should be the most recently completed fiscal year (filed within the last 18 months). If the organization is legally exempt from filing a 990, please upload documentation that explains the organization is not required to file.

_____ **Current Annual Budget**

The organizational budget should follow the agency’s current fiscal year.

_____ **Organization Financials**

All financial documents submitted should be for the most recently completed fiscal year. Depending on your organization’s gross revenues, different financial documents are required for submission. Please read the instruction below to determine whether a Financial Audit or Board Approved Review is required.

Annual Financial Audit Requirement

Organizations with gross revenues **\$750,000 or more**, financial statements audited by an Independent CPA should be submitted. Please include a complete copy of the Management Comment Letter.

Board Approved Financial Review Requirement

Organizations with gross revenues **less than \$750,000**, financial statements reviewed and approved by the Board of Directors should be submitted, along with the board approved minutes. *Audited or reviewed financial statements are acceptable as well and can be used in place of internally prepared financial statements.*

_____ **Current Northwest Florida 211 Profile**

United Way 211 Northwest Florida is a live, 24-hour helpline providing all people with crisis, health and human services support and connecting them to resources in our community. Please email resources@uwwf.org to confirm and update your 211 profile **OR** initiate the process to get your agency listed.

UNITED WAY EMERALD COAST AND _____
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 _____ (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 \$ _____ to support the operations of _____ (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 fulfilment. 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.



AGENCY:

Date:

Print Name:

CEO or Executive Director

Signature:

CEO or Executive Director

UNITED WAY EMERALD COAST:

Date:

Print Name:

President & CEO

Signature:

President & CEO

Date:

Print Name:

Board Chair

Signature:

Board Chair

DRAFT



CATEGORY	7 - 10 POINTS	4 - 6 POINTS	0 - 3 POINTS
Program Summary	service and sufficient data and research is provided to justify the need for programming. Program activities highly align with the UWEC focus area selected and provide an impactful solution to the demographics and need being addressed.	gap in service, and some data and research is provided to justify the need for programming. Program activities somewhat align with the UWEC focus area selected and provide a temporary solution to the demographics and need being addressed.	gap in service and data and research is not provided to justify the need for programming. Program activities have low alignment with the UWEC focus area selected and does not provide a solution to the demographics and need being addressed.
Performance Measures	Performance measurement(s) align with focus area and program activities, are achievable, and will effectively measure a change in program participants.	Performance measurement(s) slightly align with program activities, are somewhat achievable, and can effectively measure a change in program participants.	Performance measurement(s) do not align with program activities, are not achievable, and does not effectively measure a change in program participants.
Equity	Agency's programming has a strong and intentional commitment to reducing barriers/supporting individuals experiencing disparities in health, education, or financial stability.	Agency's programming has a vague commitment to reducing barriers/supporting individuals experiencing disparities in health, education, or financial stability.	knowledgeable in the work towards diversity, equity, and inclusion but their current programming shows no commitment to reducing barriers. Zero points if only response is along the lines of "We do not discriminate."
ALICE	Agency's programming has a strong alignment and intentional commitment to support ALICE households.	Agency's programming has some alignment and intentional commitment to support ALICE households.	Agency's programming does not have alignment or intentional commitment to support ALICE households.
Presentation	Agency was prepared, knowledgeable about the program and clearly articulated the need for the program and use of UWEC funds.	Agency was somewhat prepared, knew some information about the program, and somewhat articulated the need for the program and use of UWEC funds.	Agency was not prepared, knowledgeable about the program or did not clearly articulate the need for the program and use of UWEC funds.
Organizational Capacity	Agency is capable of delivering the proposed program and fosters strong community relationships to advance shared goals.	Agency is somewhat capable of delivering the proposed program and fosters some community relationships to advance shared goals.	The agency does not seem capable to deliver the proposed program, and lacks community relationships to advance shared goals.
Program Budget	Program demonstrates financial sustainability and is a reasonable funding request considering services being provided.	Program demonstrates some financial sustainability and is a somewhat reasonable funding request considering services being provided.	Program is not financially sustainable and is not a reasonable funding request considering services being provided.
UWEC Score - Partnership			
UWEC Score - Priorities (Equity/ALICE)			

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: _____

	Mid Year (Jul-Dec)	Final (Jan-June)	Amount Remaining
Amount Awarded: <input style="width: 80px;" type="text"/>	Amount Expended: <input style="width: 80px;" type="text"/>	<input style="width: 80px;" 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:

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 prove 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!			#DIV/0!	0	0	#DIV/0!
#% of adults who are prepared for post secondary education or employment					#DIV/0!			#DIV/0!	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%.

United Way Emerald Coast (UWEC)
2024 - 2025 Community Investment Application

Pre-Checklist:

1. Are you a current (2024) certified Partner Agency?
2. Are you requesting a grant of at least \$5,000 to support a year-round program?
3. Do you agree to collect demographic information from your clients required by UWEC to include: age, household income, and area of residence?
4. Does your organization require your clients to participate in religious services and/or activities?

If you answer “no” to #1, 2, or 3 you are ineligible to apply for grant funding. If you answer “yes” to #4 you are ineligible to apply.

Agency Information

1. Agency's Legal Name
 - a. dba (if different than above)
2. CEO or Executive Director Name, email and phone (if different than provided on certification)
3. Secondary Grant Contact (if appropriate)
 - a. Email
 - b. Phone

Program Information

**** If funding is for a specific program within your agency, please answer the following questions with that specific program's information. If not, please provide the following information for your organization as a whole and the related activities this grant would fund. ****

1. What is the name of the program your organization is seeking funds for? If you are proposing general support for your organization, please write the name of your organization here.
2. Provide a very short (1-3 sentence) description of the program for which you are requesting funding. If this grant request is funded, this description may be shared in United Way's marketing materials. (30 words or less)
3. Focus Area (Choose 1)
 - a. Health - Empower every member of our community to live a healthier life.
 - b. Education - Help children, teens, and adults achieve their full potential through quality educational programs.
 - c. Economic Mobility - Ensure neighbors have the ability to find their paths to financial independence and/or recover from unexpected crises.

Program Summary

1. Are you requesting funding for a new program, to maintain an existing program, or to expand an existing program? If this is an existing program or expansion, the following questions are required:
 - a. Please describe any success(es) and/or challenge(s) your program and/or clients have experienced this past year. Please include how these are affecting your program strategies moving forward. (200 words or less)

2. Provide a detailed description of the specific unmet need, condition, problem, or gap in services that this program addresses. Please cite at least one local statistic from the past 5 years that demonstrates the need. Please explain your program’s key activities and how they will address the need(s) identified. (750 words or less)
3. Please describe how your program aligns with the Focus Area you selected. (200 words or less)

Organizational Capacity

1. What makes your organization uniquely qualified to execute this program? (250 words or less)
2. As it relates to your program, how does your organization collaborate with other organizations in the community (other UW agencies, faith-based organizations, other community non-profits, government agencies, local companies, schools, etc.)? Please explain the role(s) they play and how they add value to your program. (250 words or less)

Equity

1. Was this program intentionally designed or modified to address disparities, advance equity, and/or reduce barriers to accessing supports/services? Yes/No
 - o If “yes,” please describe how you are reducing barriers to create equitable access to your services and/or what you are doing to reach vulnerable, underserved, or marginalized communities with your program. (300 words or less)
 - o If “yes,” what is your marketing strategy to reach, recruit, and/or retain this population(s)?
2. What percent of your clients live below the ALICE threshold? How are you targeting this demographic?

Performance Measurements

___ (projected number) unduplicated clients served *required

___ (projected number) _____ (what service did you provide)

Focus Area	Goal	Results
Health	Individuals are able to improve/maintain their health and independence.	#% individuals who develop essential life skills, increase social support, and/or improve capacity for independent living #% of individuals who demonstrate improvement in their daily functioning #% of individuals with increased food security and/or who moved towards a healthy weight
Health	Adults and youth understand the dangers of risky behaviors, avoid them, and know how to protect themselves from harm.	#% of individuals served who are able to live in a safe(r) environment where the risk of abuse, violence, and/or trauma is minimized #% of individuals who gain knowledge by participating in support groups and/or completing a recovery program #% of people who changed their behavior to engage in safer practices

Health	Families and individuals are able to access quality affordable healthcare, preventative care, and behavioral health services.	<p>##% of individuals served who improve or maintain their physical or dental health</p> <p>##% of individuals who show an increase in resiliency or improve their emotional, mental, and/or social health</p>
Education	Students are in age and/or developmental appropriate programs that support academic success and development.	<p>##% children meeting development milestones (birth to 5 year-olds)</p> <p>##% of children/teens with special needs who meet their goals</p> <p>##% of students served who improve or maintain academic performance, complete program requirements, and/or demonstrate proficiency in benchmark/assessment tests</p>
Education	Students are equipped with the skills and resources they need to succeed in school and life.	<p>##% of students who demonstrate gains by receiving support services (e.g. mentoring, tutoring, counseling)</p> <p>##% of students served who gain new knowledge or develop skills (i.e. social skills, life skills, soft skills, leadership skills, emotional development skills)</p>
Education	Individuals have the education and skills to obtain and retain household-sustaining jobs.	<p>##% of students who are prepared for education, enlistment, or employment</p> <p>##% of individuals who complete a job internship/apprenticeship, post-secondary degree, certification and/or training to meet their career needs</p>
Education	Families are prepared to support student success and/or the development of their children.	<p>##% of caregivers who demonstrate an appropriate knowledge of (co-)parenting skills and/or engagement in their child's development</p> <p>##% families utilizing resources to support student success and/or early learning at home</p>
Economic Mobility	Increase financial stability and advance economic mobility.	<p>##% of individuals who gain employment, achieve career advancement, or increase wages</p> <p>##% of individuals who improve financial situation by accessing economic supports (ie. EITC, SNAP, FAFSA, home buyer credits, legal supports)</p> <p>##% who improve financial strength by learning new behaviors (ie. budgeting, reducing debt, increasing savings, opening a bank account)</p> <p>##% who are able to remain in the workforce by accessing supportive resources</p>

Economic Mobility	Families and individuals are able to meet basic needs and/or navigate when disaster strikes.	#% Households linked with community resources to increase self-sufficiency through case management support #% of individuals that access or maintain permanent, affordable housing % of individuals report needs met after facing housing emergency or other crises

What measurement tool(s) will you use to measure this impact? How will you implement it? In what way does it determine that the impact has been achieved? (200 words or less)

- a. Please upload the tool you will be using.

Target Population

Please describe the target population(s) to be served under this grant with UWEC funds.

1. Neighborhoods or geographic area (be as specific as possible):
2. Age (enter your estimates as % of the total; should all add up to 100)
 - 0-18 years
 - 19-64 years
 - 65+ years

What tool(s) will you use to track the demographic information required by UWEC? Required demographics include # clients served (unduplicated preferred), city of residence, gender, income, age, race, ethnicity. Military status is preferred but not required.

- a. Please upload the tool you will be using.

Program Budget

1. Total Program Budget
2. Amount Requested
3. Is your agency able to leverage this UWEC grant as a match for state, private, or federal funding? If yes, please provide additional details including the funding source, ratio of match for every dollar received, and amount of UWEC funding eligible for match. (200 words or less)
4. If your full request cannot be funded, what would your reduced request be and how would the program be adjusted? (200 words or less)
5. Please complete the budget template form and upload to the website.

Please use this space to share any additional information about your agency that helps strengthen your request (management practices, volunteer management, diversification of funds, governance, etc.).

ACH will be the preferred payment method for designations and grant awards moving forward. Please provide the information below.

Financial Institution:

Accounting #:

Routing #:

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, can render the submission as non-qualifying and ineligible for funding or further consideration in this funding cycle.

The undersigned also understands that this grant request is for 7/1/24-6/30/25 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 2024-25 Community Investment 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

United Way Emerald Coast
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 and the related activities this grant would support.

GRAY CELLS DON'T REQUIRE A RESPONSE AS THEY WILL AUTOPOPULATE.

Organization:	
Program Name:	
Program Period:	7/1/24-6/30/25

	Non-UWEC Funds Only Program Budget 2024-25	UWEC Funds Only Program Budget 2024-25	Total Program Budget 2024-25
INCOME (round to whole numbers)			
United Way Emerald Coast Funding			\$ -
Contributions (Individuals, Foundations, Businesses)			\$ -
Federal/State Grants or Contracts			\$ -
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	\$0.00	\$0.00	\$0.00
PROGRAM EXPENSES (round to whole numbers)			
Personnel (salaries/wages, benefits and taxes)			\$ -
Contractors and/or Professional Services			\$ -
Travel and Vehicle(s)			\$ -
Program Supplies (specify by replacing this text with an explanation)			\$ -
Marketing, Printing, Postage & Shipping			\$ -
Occupancy (rent/mortgage, utilities, maintenance, repairs, insurance)			\$ -
Office Supplies, Technology, Rental Equipment			\$ -
Food/Beverage and/or Recognition			\$ -
Background Screening			\$ -
Conferences, Training & Professional Development			\$ -
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	\$0.00	\$0.00	\$0.00
Net Income	\$0.00	\$0.00	\$0.00

Please provide an explanation if your budget is not balanced:

FREQUENTLY ASKED QUESTIONS

Community Investment 2024-25 Grant Cycle

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 categories of investments: Health, Education, and Economic Mobility.

How do I know if I should apply under Health, Education, or Economic Mobility?

You should review focus area statements available online at <https://www.united-way.org/our-impact>. Once in the application, you can review the impact area outcomes by selecting a focus area. 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. Organizations may choose the focus area in which they would like to apply.

What is the funding period for this grant?

The funding period for this grant is July 1, 2024, through June 30, 2025. UWEC awards grants for one year and grant proposals describe programmatic costs for one year. 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 expect to award between \$325,000 - \$400,000 through this funding opportunity. In 2023, funding awards were between \$5,000 and \$32,411 with the average grant amount of \$16,522.

What will UWEC fund?

UWEC invests in programs with measurable outcomes that align with the organization's focus areas. UWEC funds can be used on any program related expenses such as: personnel (salaries, benefits and payroll taxes), supplies, marketing and promotion, travel, equipment, and other unidentified program expenses.

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 UWEC Partner Agencies only. An agency or program that has not received United Way funding previously is invited to submit a proposal for a Community Investment Grant.

Will funding for programs who received funding in the 2024-25 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 the Focus Areas selected.

What won't UWEC fund?

UWEC will not fund requests for: Capital Campaigns, Debt Services, Endowments, Fundraising Events, Programs not aligned with one of the UWEC focus areas, Building Renovations, Large Capitol Purchase (i.e., vehicles, buildings, etc.), and short-term initiatives less than one year.

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. ALICE is who UWEC fights for and prioritizes programs targeted at that population. Visit <https://www.uwof.org/alicer> to learn more.

What is equity?

United Way Worldwide's definition of equity is: Equity is the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historic barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer predict socioeconomic, education and health outcomes. Programs making advancements in equity for our community are prioritized for funding.

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 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 coworker, board member, or key volunteer.

If you have any further questions, please contact Aubrey Robbie, Director of Impact at aubrey@united-way.org or 850.812.3386.