



2027 PARTNER AGENCY APPLICATION AND GUIDE

ABOUT PARTNER AGENCY CERTIFICATION:

To become a certified Partner Agency, non-profits must meet specific eligibility criteria. Certification is valid for *one year* and must be renewed annually. There is **no cost** to apply or participate.

- Please review our eligibility requirements in this guide to see if your organization may qualify.
- You may find a list of benefits [here](#).

Applications open Thursday, October 1, 2026 and will be accepted through Friday, November 20, 2026 at 5pm CST. All attachments should be uploaded as PDF documents. Please note that late, incomplete, or inaccurate applications will not be considered.

What is UWEC looking for in your application and attachments?

- Compliance with legal requirements and non-profit best practices
- Active board oversight (fiduciary and governance)
- Diversification of revenue sources and organization's sustainability
- Debt ratio: Ideally the current liabilities are 75% or less of the unrestricted net assets amount
- Ratio of administrative costs to total expenses: Ideally overhead costs are 33.3% or less of total expenses
- Disclosure of any pending or current litigation that could materially affect organization's health

Helpful Tips

- While not required, you may want to **create an account**, or sign into your existing one so you can save your progress as you go. We encourage you to save your work often!
 - [Create an Account](#)
 - [Video Instructions](#): Watch this short video for help getting started. Please focus on instructions through 1:58; the remainder of the video covers other applications and may be disregarded. Please note, this video was created by another United Way, so the website may look different, but the account setup process is the same.
 - If you need to change the email address associated with your account (for example, you're trying to reset the password but are not receiving the new link), you will need to contact our webhost, OneEach. UWEC staff CANNOT reset your password or change your log in credentials for safety purposes. You may submit a support ticket [here](#) - please enter "United Way Emerald Coast" as the "Organization Name" and "www.united-way.org" as the "Website URL." These fields are looking for UWEC's information, not your organization's information.
- You may consider using this Word document or PDF to prepare your application.
- Gather documents early. Save them with clear file names before uploading.
- Check for accuracy. Outdated or incorrect documents (ex: expired tax-exempt form or an old 990) will result in denial. To assist you, we provided several examples of required documents to help ensure you are attaching the correct items.

- **YOU SHOULD ASSUME ALL QUESTIONS ARE REQUIRED** unless otherwise stated. Some responses to questions may open additional fields requiring more information. Choosing not to provide additional information will likely result in denial.
- Please note that, due to the high volume of submissions, we do not offer courtesy reviews. Your application will be evaluated based on the documents you submit with your online application.

A Note from Our Team

We want you to succeed! We value our partnerships and believe in the power of collaboration. While this process is thorough, it is not intended to exclude any organizations. Our goal is to ensure transparency, accountability, and strong partnerships that make a meaningful community impact. **We look forward to receiving your application!**

Questions? Please contact our Impact Manager, Ginger Weathers at ginger@united-way.org or 850-812-3385.

**United Way Emerald Coast
2027 Partner Agency Application**

You must submit your application online at: <https://www.united-way.org/certification>

Partner Agency Status

If you are a current 2026 Partner Agency, you will be given the option to submit an abbreviated application. Current 2026 Partner Agencies will select their agency name from a dropdown menu. If you are a current Partner Agency, but your organization has experienced significant organizational changes, please fill out a full application. If you are not a current 2026 Partner Agency, you will be required to complete a full application.

Agency Information

General Contact Information – Organizations filling out an abbreviated application will not see the first 3 fields.

- Agency Legal Name
- Agency DBA (if applicable)
- Federal EIN
- Executive Director/CEO Name
- Executive Director/CEO Email
- Executive Director/CEO Cell Phone
- Agency Physical Address
- Agency Mailing Address (if different than above)
- Please list any additional team members you would like us to contact about future opportunities (for example, volunteer coordinators, grant writers, or other staff).
- Year organization was established
- Website
- Social Media URL/handles (Facebook, Instagram, LinkedIn, TikTok, other) (optional)
- Logo in jpeg format
- Mission statement
- Agency overview and focus

Checklist I

You **MUST** answer “yes” to all the following; a “no” response will *require* an explanation:

(Please note: a “no” response does not automatically result in application denial, however, additional information is required. Please provide additional details.) **You will not see the full Checklist I if you are filling out an abbreviated application.**

STANDARD	CIRCLE ONE
Agency has a local presence and programming in Okaloosa and/or Walton County, FL	Yes or No
Agency is incorporated in the State of Florida (verified through SunBiz)	Yes or No
Agency complies with all federal, state, and local laws and regulations	Yes or No
Agency has Current proof of Florida tax exempt status: May verify by Consumer's Certificate of Exemption, Form DR-14, from Florida Department of Revenue) OR documentation that the organization is excluded or exempt from this requirement	Yes or No
Charitable Solicitation Letter verifying current registration with the Florida Department of Agriculture and Consumer Services (FDACS): May verify current status at FDACS' check-a-charity website (https://csapp.fdacs.gov/CSPublicApp/CheckACharity/CheckACharity.aspx)	Yes or No
Agency has an active and responsible local governing board of 3+ members who:	Yes or No

- Are unrelated to other Board Members and/or Senior Staff - Majority are uncompensated volunteers - Have no material conflicts of interest - Meet at least quarterly to exercise effective financial, service, governance, and administrative control - Maintain meeting minutes for all governing board meetings - Approve the organization's annual budget	
United Way's 211 Northwest Florida is a 24-hour helpline and online database that connects individuals with crisis, health, and human services resources in our community. Do you agree to create and/or maintain an accurate profile with 211 Northwest Florida? - To verify your current listing, please visit https://211nwfl.communityos.org/ - If you need to create a profile, or make changes, please email resources@uwwf.org	Yes or No
Do you certify that all United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders?	Yes or No

Checklist II

You **MUST** answer "no" to all the following; a "yes" response will *require* an explanation:

(Please note: a "yes" response does not automatically result in application denial, however, additional information is required. Please provide additional details). **You will not see the full Checklist II if you are filling out an abbreviated application.**

STANDARD	CIRCLE ONE
Does the agency have any current or pending litigation against the Board of Directors, Organization Executive(s) and/or the organization that was not captured in the financial audit?	Yes or No
Does your organization discriminate against any individual or group in your hiring and employment practices, codes of conduct, programs, services, or in any other aspect of your operations or activities?	Yes or No
Currently, or in the past 3 years, have there been any pending or threatened litigation, regulatory actions, formal complaints, penalties, or investigations by government agencies for violations of local, state, or federal laws?	Yes or No
Currently, or in the past 3 years, has your organization experienced or suspected of any fraud, theft, or improper allocation of resources or assets?	Yes or No

Attachments

ATTACHMENT	DATE ON PAPERWORK
Most recent IRS Form 990 - Must cover a period ending on or after December 31, 2024 - Should match the year of the audit, review, or board-approved financial statements you provide within this application - If your organization is legally exempt from filing a 990, please upload a document that confirms this	Calendar/Fiscal year covered (start – end dates): Date filed:
Verification of 990 extension, if applicable	
Most recent Audit - If your organization received \$1 million or more in annual contributions, you must provide your most recent independent financial audit. - Must cover a period ending on or after December 31, 2024 - Should match the year of the IRS Form 990 you provide within this application	Calendar/Fiscal year covered (start – end dates):

- Include the auditor's report where the auditor states whether the financial statements present fairly in accordance with GAAP. This is where you'd see the language about an unmodified opinion (a "clean" opinion), a qualified opinion, adverse opinion, or disclaimer.	Date filed:
Audit management letter and response, if any - The management letter may provide recommendations, observations, and notes on internal controls or operational improvements. It highlights any control deficiencies (significant deficiencies or material weaknesses) and other recommendations.	
If organization's annual revenue for the time period covered by the IRS Form 990 was less than \$1,000,000, and an audit was NOT completed, you have two options: OPTION 1: Submit financial states reviewed by an independent CPA in accordance with GAAP OR OPTION 2: All 3 of the following internally prepared documents must be submitted: • Statement of Financial Position (Balance Sheet) for the most recently completed fiscal/calendar year. • Income Statement (Profit & Loss/P&L or Statement of Activities) for the most recently completed fiscal/calendar year. • Board Meeting minutes documenting the Board's review and approval of these financial statements.	Calendar/Fiscal year covered (start – end dates:
If the financial statements or IRS Form 990 submitted above are for a parent, umbrella, state, national, or global organization and do not separately reflect the finances of the local organization applying for partnership, you must also provide financial documentation specific to your local operations. Please submit the following for the most recently completed fiscal/calendar year: • Statement of Financial Position (Balance Sheet) for the local organization/operations, if maintained separately • Statement of Activities (Income Statement/Profit & Loss) for the local organization/operations If separate financial statements are not maintained for your local operations, please provide equivalent internal financial reports that clearly show the revenue and expenses associated with your local operations.	Calendar/Fiscal year covered (start – end dates:
Current Annual Organization Budget - Please submit your current 2026-2027 fiscal year budget OR 2027 calendar year budget. If the 2027 calendar year budget is not yet ready, please submit your 2026 budget. UWEC may request your 2027 budget once it's prepared. - Your budget must include anticipated revenue, expenses, <u>and</u> net income for the current fiscal/calendar year.	Calendar/Fiscal year covered (start – end dates):
How many months of expenses do your organization's operating reserves (cash or cash equivalents) represent? Calculate this using the organization's annual expense budget, dividing by 12 to determine one month's expenses. Divide the operating reserves by one month's expenses to determine the number of months the reserves will cover.	Choose one: Less than 3 months 3-6 months More than 6 months

OPTIONAL –

ACH is UWEC's preferred payment method for designations and grant awards. Would you like to provide us with your banking details now? If you choose not to provide them now, you will have the option to provide them in the future if you are selected for funding, however, payments may be delayed. **Yes or No**

- Financial Institution:
- Routing # (9-digit number that identifies your financial institution):
- Account #:

OPTIONAL –

Please provide any additional context, particularly regarding anticipated or current deficits, budgetary surplus, outdated documentation, or other relevant considerations.

Signature by authorized representative