



## Agency Eligibility

### Affiliation Guidelines (Prequalified Checklist):

United Way of Okaloosa & Walton Counties Community Impact Committee has established the following policies regarding the process for affiliation as a Certified Community Partner (CCP) and the distribution of funds.

For an agency to be considered for partnership with the United Way of Okaloosa & Walton Counties, it must meet the criteria below. The agency must remain in compliance with the criteria at all times. An agency application submission does not ensure automatic approval of a CCP nor does it guarantee grant funding with the United Way of Okaloosa & Walton Counties. All agency CCP applications are reviewed individually for approval or denial by the United Way of Okaloosa & Walton Counties Board of Directors following the recommendation from the Community Impact Committee.

The agency must:

- Be recognized as an organization exempt from federal income tax under the IRS Section 501(c)(3) Internal Revenue Code 1954.
- Be registered with the State of Florida's Department of Agriculture and Consumer Affairs.
- Be incorporated or chartered under federal statutes.
- Ensure that the name of the applying organization must match the IRS Determination letter. If the name of the organization differs, official documentation from the IRS or state government authorizing use must be provided.
- Be primarily involved in providing programs(s) and services that focus on the Community Impact areas: Health, Education and Financial Stability. These programs must service residents within the borders of Okaloosa and/or Walton counties.

## **Affiliation Guidelines** continued:

- Have an independent governing body consisting of voting members who act as the Board of Directors.
- Maintain a non-discrimination policy for staff and clients that does not discriminate based on race, color, religion, gender, nation origin, age, marital status, veteran status or status as a person with disability.
- If required by the IRS, provide the most recent audit, not more than 18 months prior to application deadline, performed by an independent certified public accountant, in accordance with the Generally Accepted Auditing Standards (GASS). Agencies not required to have an IRS audit may submit a financial review.
- Provide a complete IRS Form 990 for a period ending not more than 18 months prior to the application deadline. If the agency's Form 990 is part of a national organization that does not separate by the local services areas of Okaloosa and/or Walton Counties or if the IRS does not require the organization to file the Form 990, the agency is required to provide its most recent fiscal year-end, board-approved financial statements.
- Strive to maintain an organizational annual percentage for administrative and fundraising cost at or below 25%. In the event the administrative and fundraising cost are greater than 25% a written detailed explanation of how your agency plans to reduce its administrative and fundraising costs is required for consideration.

Eligibility for Community Certification Partnership (CCP) will be based on a review of the applicant's Letter of Intent (LOI) and other supporting documentation. Certified Community Partners must apply every calendar year and provide required documents as specified in the application deadline typically from November 1st to December 31st. If your organization is unable to satisfy any one of the requirements for certification, please submit a letter outlining that reason. If a requirement is not met and no justification is included, your agency's application for Certified Community Partnership may be rejected.