



FILL OUT THE FOLLOWING INFORMATION

This application was completed by: _____
Email for this person: _____
Phone for this person: _____

FOR UNITED WAY PERSONEL USE ONLY

2017 United Way Application Received: Date/Time _____

**2017 UNITED WAY OF OKALOOSA AND WALTON COUNTIES
CAMPAIGN APPLICATION FOR 2018 FUNDING**

These instructions and forms are intended to assist local charitable organizations in the process of applying for 2017 funding from United Way of Okaloosa and Walton Counties. To be considered, this application and all requested attachments must be complete and submitted by **12:00 pm, Friday January 27th, 2017**. **All applications must be submitted through the online platform. Handwritten forms and attachments will not be considered, nor will paper submissions. Late or incomplete applications will be cause for rejection by the United Way.** The certifying official’s signature must be original (blue ink, please). No automatic pens and/or signature stamps please. Acceptance as a United Way Partner Agency requires recommendation by United Way Funds Distribution, and approval by the United Way of Okaloosa and Walton Counties Board of Directors. A training session will be held at Doolittle Institute in Fort Walton Beach at 10:00am on Friday December 16. Please bring your questions.

Name of Applying Organization: _____

For purposes of this application, identify:

- Your Executive Director: _____
- An email address for this person: _____
- A contact number for this person: _____

FUNDING REQUEST

- How much did you request in 2016: \$ _____
- How much are you requesting for 2017: \$ _____
- Realizing that UWOW’s allocation is “unrestricted,” in fewer than 100 words, how do you plan to utilize United Way dollars received in 2017? Please provide a brief explanation of what needs your agency has in 2017 if your funding request has increased by more than 5%, or if your need for funding has significantly changed in the last year.

BENEFICIARY DATA

Nonprofit organizations serve individuals and families each year ... *often more than once in a year*. To support its *Case for Giving* United Way requires community agency beneficiary information in the form of Units of Service. A commonly accepted definition for a *Unit of Service* is: Any individual or family given care – as in, “200 unique children attended Crestview’s Youth Center Organization at least once during 2016” or, “47 couples were counseled for marital problems in 2016 by the Counseling House of Freeport.” For food, please use “number of meals” provided. Please define a *Unit of Service* for your organization and then enter the number of 2016 Units of Service you provided for Okaloosa and Walton Counties.

2016 BENEFICIARY DATA

Our Unit of Service is defined as: _____

Have you achieved a significant increase in services from 2015 to 2016?: _____

If so, please make a note of your success: _____

If you maintain a waiting list, how many names does it contain? _____

2016 Units of Service

Okaloosa County

North County Total _____

South County Total _____

Total Okaloosa County _____

Walton County

North County Total _____

South County Total _____

Total Walton County _____

Other/Unknown _____

Total 2016 Units of Service _____

SERVICE CENTER LOCATIONS

In order to communicate to our many communities where your offices are located, please list any and all Okaloosa and Walton County Service Center Locations. Please include, their Addresses, Phone Numbers and any other pertinent contact information. Use additional paper if needed.

1. _____ 2. _____ 3. _____ 4. _____

5. _____ 6. _____ 7. _____ 8. _____

BUDGET AND FINANCIAL INFORMATION

What are the results from your internal 2016 United Way employee campaign? \$ _____

Please list all fundraising events you have planned for 2017 (list dates if possible): _____

Our Fiscal Year runs from (date) _____ through _____

***PLEASE ATTACH A COPY OF YOUR MOST RECENT LOCAL BUDGET.**

Other anticipated 2017 funding sources: Federal \$ _____ State \$ _____ Other United

Ways \$ _____ Okaloosa County \$ _____ Walton County \$ _____ Other \$ _____

No. Full Time Employees _____ No. Part Time Employees _____ No. Volunteers _____

In your fiscal year 2016 did you add new staff members to provide new services to the community?
If yes, what new services are being provided as a result? _____

On your 990, please review revenue less expenses on Line 19, Part I. If there is a loss, please review what generated the loss in Other Expenses in Part IX of your 990. If further explanation is needed, please provide it below. _____

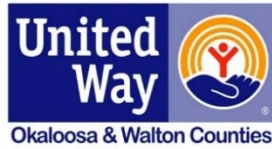
Were there any major financial accomplishments in 2016 that United Way funds were used for?

As stated in the United Way Affiliation Guidelines, all partner agencies, including the United Way itself, must maintain an administrative rate below 25%. This rate is calculated by dividing the agency's total Management Expenses and Fundraising Expenses from Part 9 of the 990, by the total Revenue listed in Part 8. In other words, **(Part 9, Item 25 Columns C+D / Part 8, Item 12 Column A)**. Please list your administrative rate: _____

If your administrative rate is above 25%, according to the above formula, please provide a brief explanation: _____

LIST OF BOARD OF DIRECTORS, TERMS, AND 2016 MEETING DATES

Executive Members of the Board	Terms
General Members of the Board	Terms
2016 Meeting Dates	



PLEASE COMPLETE THE FOLLOWING INFORMATION TO BE USED IN OUR 2017 UNITED WAY BROCHURE.

Organization Name: _____
(This MUST be the name on the front of your application.)

Phone Number to be listed: _____

Website to be listed: _____

25-WORD STATEMENT (Do not hyphenate, one word per block).

REQUIRED ATTACHMENTS TO THE APPLICATION

Attachment A – Documentation of local presence (use template provided)

Attachment B – IRS 501C3 determination letter

Attachment C – Audited Financial Statements (if total revenues are \$250,000 or greater)

- Agencies that have a total operating budget less than \$250,000 may submit to a financial review rather than an audit.

Attachment D – Local Budget (must represent Okaloosa and Walton Counties)

Attachment E – IRS Form 990 (990 EZs are not acceptable)

- If you are a member of a national organization and your 990 does not represent local numbers, please submit a copy of your most recent Board Approved Year-End-Financial Statements.



PARTNER AGENCY COOPERATIVE AGREEMENT

United Way’s mission is, “To serve donors, advocates, and volunteers with the organization and leadership they require to provide financial stability, educational opportunities, and healthy lives to their community.” For our agency partnerships to be successful toward this end, this agreement exists between United Way and:

(Partner Agency Name)

We agree to:

- Adhere to all Certification Standards and Affiliation Guidelines.
- Demonstrate to United Way that management and general operating costs do not exceed 25% of the organization’s total annual operating budget.
- Participate in promoting United Way’s annual fundraising drive by actively encouraging and enlisting the participation of our governing body, staff, and volunteers.
- Conduct an annual United Way employee campaign offering payroll deduction.

Because of United Way’s brand equity, Partner Agencies gain significant credibility by belonging to the United Way Family of Partner Agencies. Funding recipients are therefore required to identify their affiliation with United Way by proudly displaying the United Way logo and name on letterhead, website, social media, brochures and newsletters.

Should a Partner Agency fail to abide by these agreements, or should it discontinue providing the services to the community as recognized by United Way, the United Way Board of Directors may terminate this agreement, at its discretion, and the balance of allocated funds will not be disbursed.

(Signature) (Title)

(Print Name) (Date)



ANTI-TERRORISM COMPLIANCE AGREEMENT

In compliance with the USA PATRIOT ACT and other counterterrorism laws, the United Way of Okaloosa and Walton Counties, 112 Tupelo Avenue, Fort Walton Beach, FL 32548, requires that each applying agency certify the following:

"I hereby certify on behalf of _____ (name of grantee/agency) 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."

Organization Name _____

Mailing Address _____

City, State, Zip Code _____

Federal ID Number (EIN) _____

(Signature) _____ (Title)

(Print)



Affiliation Guidelines

United Way of Okaloosa-Walton Counties

The United Way of Okaloosa-Walton Counties Fund Distribution Committee has established the following policies regarding the process for affiliation as a partner agency and the distribution of funds.

The United Way of Okaloosa-Walton Counties funds Health, Education and Human Service nonprofit 501(c)(3) agencies that meet the needs of citizens located within Okaloosa and/or Walton Counties. The agencies we support are generally grouped into three categories: Children and Education, Financial Stability and Disaster Preparedness, and Health and Prevention.

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

The agency must:

- Be incorporated or chartered under federal statutes.
- Be registered with the State of Florida's Department of Agriculture and Consumer Affairs.
- Be recognized as an organization exempt from federal income tax under IRS Section 501(c)(3) Internal Revenue Code 1954 for a minimum of two (2) years prior to request for admission.
- 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. However, this requirement may be waived at the discretion of the Funds Distribution Committee.
- Be primarily involved in providing program(s) and services that are health, education or human service related and directly service Okaloosa and/or Walton County residents and/or employers.
- Have an independent governing body consisting of volunteer voting members who act as the Board of Directors.
- Maintain a non-discrimination policy or plan for staff and clients that does not discriminate on the basis of race, color, creed, religion, gender, national origin, age, marital status, veteran status or status as a person with a disability.
- Provide an annual audit performed by an independent certified public accountant, in accordance with the Generally Accepted Auditing Standards (GAAS), not more than 18 months prior to the application deadline. Agencies that have a total operating budget less than \$250,000 may submit to a financial review rather than an audit.
- 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 service 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. If an agency operates on a calendar year and the year-end financial statements have not yet been approved by the board of directors by the application deadline, it must submit its year-end financial statements and the board-approved financial statements from the prior year.

- Maintain an organizational annual percentage for administrative and fundraising expenses at or below 25.0%. If administrative and fund raising costs are greater than 25%, give a detailed explanation for consideration.
- Demonstrate adequate understanding of community needs in Okaloosa and/or Walton County and services currently being provided. Demonstrate that there are adequate benefits to both the agency and the United Way from an affiliation.

Eligibility for affiliation will be based on a comprehensive review of financial, program and operating conditions of the applicant agency and the need for the type of program(s) the agency provides in Okaloosa and/or Walton Counties. This review will take place upon submittal of the organization's application.

- Partner agencies must apply every campaign year and provide required documents as specified in the application by the deadline.
- Agencies must appear before the Fund Distribution Committee annually to be considered for approval and funding. Agencies who fail to attend the scheduled annual review process without prior notification may be subject to denial and/or non-funding regardless of application submission.
- New approved agencies will be eligible for undesignated funding following two (2) years as an approved agency by the committee and the Board of Directors. However, this requirement may be waved at the discretion of the Board. Example: New agency approved for 2016 Campaign will become eligible for undesignated funding in Campaign 2018.

Accepted affiliated partner agencies of the United Way of Okaloosa-Walton County will agree to:

- Be an active participant in United Way of Okaloosa-Walton County's annual community campaign. Providing Loaned Executives, and promoting our campaign on social media are two examples of this.
- Conduct a United Way workplace campaign within the agency and encourage 100% participation.
- Identify their affiliation with United Way by proudly displaying the United Way logo and name on letterhead, website, social media, brochures and newsletters.



AGENDA FOR AGENCY SITE SCHEDULES AND VISITS

At an orientation in February, United Way Funds Distribution volunteers will be assigned to 6 sets of panels of between five to seven people. The Panels will be grouped by *area of focus*: Children and Education, Health and Prevention, and Financial Stability and Disaster Readiness. At February meetings of the panels, the panelists will review agency applications from all three focus areas and draft questions on the services and use of United Way dollars. Partner Agency Site Visits will occur in March and April. A Panel assigned to a specific *area of focus* will visit each agency to hear presentations by the executive director and volunteer leadership and then tour the agency. The Fund Distribution season will be capped by a meeting of these same volunteers in May where their recommendations will lead to a Goal Setting decision by the United Way Board of Directors.

To schedule the Site Visit a representative from the panel will call you. If an agency has multiple locations or if the agency offices are located outside of Okaloosa or Walton Counties, efforts must be made to settle time and location to include providing directions from United Way's office. Panels will visit up to four agencies on the day of your visit so the agency must help the panel maintain a tight schedule (see sample *site visit agenda* below). Panelist each have three ring binders to help them in the process. **Partner Agencies are asked to "three-hole punch" any handouts distributed at these site visits.**

Targeted schedule for a panel on a Site Visit day: Visit Agency One at 8:00 and hear the agency presentation, tour the agency at 8:30, and leave at 8:50 for the next agency, and so on. This is your agency's opportunity to show off its facilities, materials and staff. Please be ready for them.

8:00 – 8:50 Site Visit Agency 1
9:10 – 10:00 Site Visit Agency 2
10:20 – 11:10 Site Visit Agency 3

Agency Director's Meetings will be held at Doolittle Institute to cover application questions and due dates, as well as 2017 Funds Distribution requirements. These meetings are intended as training events and should be attended by either the Executive Director or by a staff member responsible for completing this year's application. If you have further questions, please contact Sarah Voltmann Costello, the United Way Program Director, by email at sarah@united-way.org. Thank you for all that you do for our community!

LIVE UNITED.
GIVE. ADVOCATE. VOLUNTEER.

