



United Way
of Northwest Florida

United Way of Northwest Florida 2023 Affiliated Agency Prequalification Checklist

(This document is intended to help you decide if you meet the requirements for affiliation. It is not a part of the application and is not required to be turned in to UWNWFL)

PREQUALIFICATION CHECKLIST: My Agency.....

- Provides high quality services to persons residing in Bay, Calhoun, Gulf, Holmes, Jackson, and/or Washington County (s)
- Has a clearly stated mission that aligns with UWNWFL's Mission and Vision Statements and works in the area(s) of Education, Health and/or Financial Stability
- Is registered and in good standing as a non-profit
- Complies with all State and Federal laws and regulations and upholds a 501(c) 3 tax-exempt status
- Maintains a responsible Board of Directors, that serves without pay, meets regularly and effectively governs the organization to further its mission
- Tracks and evaluates client level data to assess the effectiveness and reach of services
- Conducts an annual audit, prepared on an accrual basis, and executed by an independent CPA (unless exempt)
- Has filed a Form 990 or 990EZ for the most recent fiscal year (unless exempt)
- Is willing to submit required financial statements and documents for the most recently completed fiscal year as part of the Affiliated Agency application process
- Holds a license to solicit as required by the Charitable Organizations and Solicitations Act-Act 169 of 1975
- Is willing to provide the documents requested in the Affiliated Agency application
- Is willing to assist UWNWFL in fundraising activities and development of donors
- Is willing to work as a part of a team and network of Non-Profits to better NWFL!