



United Way of Escambia County Agency Documentation / Information Checklist

United Way of Escambia County is the vehicle that can be utilized by an agency to apply for funding from three separate sources:

1. The United Way general community wide campaign.
2. The Combined Federal Campaign (CFC) for all employees of the federal government.
3. The Florida State Employees Campaign (FSEC) for all employees of the state of Florida.

The three campaigns run concurrently in the fall of each year. In order for United Way of Escambia County to solicit contributions and/or pledges on behalf of any agency or group of agencies during these campaigns, United Way must be able to assure donors that certain requirements have been met. It is the responsibility of United Way to provide and/or conduct an annual documentation audit substantiating these assurances.

Agencies can complete eligibility steps in advance of the annual campaigns to keep from having to “resubmit” all paperwork on years that they do not wish to apply for funding from a specific campaign. In the case of the UWEC annual campaign, some paperwork is only required once and will be kept in the agency files housed at UWEC offices. In order to promote an agency as a certified partner, some documents must be updated on an annual basis to ensure UWEC is exercising due diligence on a donor’s behalf.

Certification does not guarantee funding and/or designated contributions, but does assure agency listing as part of the United Way of Escambia Federation. Therefore, certification will include, but not be limited to, all requirements of the other fundraising campaigns. See the attached requirements for certification to clarify your needs.

Annual percentage for administrative and fundraising expenses: This percentage is computed from the IRS Form 990 submitted with this application. Add the amount in Part IX (Statement of Functional Expenses), Line 25, Column C (Management and General Expenses) to the amount in Line 25, Column D (Fundraising Expenses), and divide the sum by Part VIII (Statement of Revenue), Line 12, Column A (Total Revenue). No other methods may be used to calculate this percentage. All percentages must be listed to the tenth of a percent (e.g. 15.7%).”

United Way of Escambia County
1301 W. Government Street
Pensacola, FL 32502
1-850-434-3876 or agency@unitedwayescambia.org

LIVE UNITED™



United Way of Escambia County Agency Documentation / Information Checklist for Certification

Agency Name: _____

Fiscal Year: Calendar year Fiscal Year (Beginning / End Dates: _____)

Annual Meeting Date: _____

Date of Initial Certification Packet Submittal: _____

Date of Approved Certification: _____

Items to be Submitted One Time

- IRS Determination Letter
- Articles of Incorporation
- Agency Bylaws **if applicable, must submit updates to bylaws annually*
- State of Florida Tax Exempt Certificate (**Form DR14, Florida Dept. of Revenue**)
- State of FL Solicitation Registration Number (**FL Dept. of Agriculture & Consumer Services**) ** must be resubmitted 30 days prior to expiration date*
- UWEC Certification Agreement

Items to be Updated Annually (July 1st each year)

- Current Board of Directors list (**with addresses and phone numbers**)
- Current annual report
- 25 words defining organization's purpose- end with administrative & fundraising percentage
Administrative and fundraising percentage must be below 25% of overall operational budget
- IRS Form 990 (most recently completed)
- Board of Directors meeting schedule
- Most recent External Agency Audit (*if required by IRS or CFC*)
- Patriot Act Compliance letter
- Agency Support Form

Name of Agency: _____

President / CEO: (print name) _____

President / CEO Signature: _____ date: _____

Agency Contact: _____ title: _____

Phone: _____ email: _____