

APPLICATION PROCESS AND ELIGIBILITY REQUIREMENTS FOR 2026-2027 FUNDING

Guidelines for Agencies Seeking Funding

The 2026-2027 funding process begins with the submission of the Pre-Application form and supporting documents. After United Way staff review the materials received, agencies that meet the preliminary requirements may receive a New Agency Application via email, enabling them to proceed further in the application process.

Eligibility Requirements

Agencies interested in applying for funding must meet the following criteria:

1. Local Presence and Programming

The agency must have a substantial local presence and offer programming within Palm Beach County, ensuring direct engagement and impact on the community.

2. Incorporation in Florida

The agency must be incorporated in the State of Florida as a not-for-profit entity. It must also possess valid Articles of Incorporation and Bylaws. Furthermore, the agency should be incorporated for at least two years before January 1st of the application year.

3. IRS Tax-Exempt Status

The agency must hold tax-exempt status under 501(c)(3) of the Internal Revenue Code. Additionally, it must have confirmation from the IRS that the agency is not classified as a private foundation under Section 509(a) of the Code.

4. Charitable Solicitation Letter

The agency must be registered with the Florida Department of Agriculture and Consumer Services. It is essential to have a valid Charitable Solicitation Letter, confirming legal compliance for fundraising activities.

5. Community Programming Documentation

Applicants must demonstrate and provide documentation of their community programming and activities.

6. Active and Responsible Governing Board

The agency must have an active and responsible governing board of three or more members, who have no material conflicts of interest and the majority of whom serve without compensation.

7. IRS Form 990 Compliance

The agency must file an IRS Form 990 within 6 months of the end of the last fiscal year or have filed an extension with the IRS.

8. Expense Ratio Standards

The agency's fundraising plus management expenses must represent 25% or less of the total expenses for the last fiscal year, as reported on the IRS Form 990.

9. Audit and Financial Transparency

The agency must be audited by an Independent Certified Public Accountant and have a GAAP audit with an unqualified opinion for the most recently completed fiscal year.

10. Non-Discrimination Policy

The agency does not discriminate in providing services through programs and staffing based on race, color, religion, gender, national origin, age, sexual orientation, disability, marital status, veteran status, or any other characteristic protected by law.

11. Regulatory Compliance

The agency complies with all Federal, state, and local rules, regulations, and codes, as well as all applicable licensing requirements governing its operation.

TOWN OF PALM BEACH UNITED WAY | NEW PARTNER AGENCY PRE-APPLICATION

The Agency **MUST** answer “YES” to all of the following to proceed further in the application process.

STANDARD	YES OR NO	
The agency has a local presence and programming in Palm Beach County	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency is incorporated in the State of Florida	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency is recognized by the IRS as tax-exempt under 501(c)3	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency has a Florida Department of Agriculture Charitable Solicitation Letter	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency can demonstrate and document community programming	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency has an active and responsible governing board of three or more	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency files IRS Form 990 in a timely manner	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency's fundraising plus management expenses represent 25% or less	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency has a GAAP audit with an unqualified opinion	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency does not discriminate in the provision of services	<input type="checkbox"/> Yes	<input type="checkbox"/> No
The agency complies with all Federal, state, and local laws	<input type="checkbox"/> Yes	<input type="checkbox"/> No

REQUIRED ATTACHMENTS

Please enter the date that appears on each document.

ATTACHMENT	DOCUMENT DATE
Articles of Incorporation	
Bylaws	
IRS 501 (c)(3) documentation from the IRS	
Florida Department of Agriculture Charitable Solicitation Letter	
Governing Board Roster	
Most recent IRS Form 990	
Most recent Audit	
Audit management letter and response (if applicable)	
Board approved agency statement regarding discrimination	

FUNDRAISING AND MANAGEMENT EXPENSES (FROM IRS 990)

1. Management expenses	\$
2. Management as a percentage of total expenses	%
3. Fundraising expenses	\$
4. Fundraising as a percentage of total expenses	%
TOTAL MANAGEMENT AND FUNDRAISING DOLLARS (lines 1 and 3 above)	\$
TOTAL MANAGEMENT AND FUNDRAISING PERCENTAGE (lines 2 + 4 above)	%

NOTE: The management expense represents the percentage of dollars spent on administering the nonprofit. This percentage is calculated by dividing the amount in Part IX (Statement of Functional Expenses), Line 25, Column C (Management and General) by Total Expenses Line 25 Column A. Fundraising Expenses are calculated as a percentage by dividing the amount in Part IX (Statement of Functional Expenses), Line 25, column D (Fundraising) by Total Expenses Line 25 Column A.