



PARTNER AGENCY ELIGIBILITY

PURPOSE

To ensure all partner agencies demonstrate strong governance, program effectiveness, and responsible stewardship of resources in alignment with the mission of the Town of Palm Beach United Way.

KEY REQUIREMENTS

Agencies must demonstrate strong organizational management practices, including:

1. Governance and Oversight

- Maintain transparent governance and effective leadership
- Comply with all applicable laws and regulations
- Demonstrate accountability and appropriate internal controls

2. Program Capacity and Effectiveness

- Deliver consistent, high-quality programs and services
- Maintain sufficient staffing, funding, and infrastructure
- Track and report measurable outcomes aligned with program goals

3. Financial Stewardship

- Demonstrate sound financial management practices
- Provide transparent financial and program reporting
- Maximize the impact of funds received
- Identify and manage organizational risk

PARTNERSHIP DETERMINATION

Partnership status is granted at the sole discretion of the Town of Palm Beach United Way. Agencies that fail to meet these standards may be denied or removed from the partnership.

ANNUAL REVIEW

All partner agencies are subject to an annual review to confirm continued compliance with these requirements and alignment with organizational priorities.

ELIGIBILITY REQUIREMENTS

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

1. Palm Beach County Presence and Programming

The agency must demonstrate a measurable and sustained presence in Palm Beach County, including direct service delivery, local staffing, or formal partnerships.

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 must have been incorporated for at least two years before January 1 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. The agency must possess a valid Charitable Solicitation Letter, confirming legal compliance for fundraising activities.

5. Community Programming Documentation

Applicants must demonstrate an active and meaningful presence in the community by providing clear documentation of their programs, services, outreach efforts, and community engagement activities. Documentation should illustrate how the organization identifies community needs, delivers services, and measures impact within the population it serves.

6. Active and Responsible Governing Board

The agency must have an active governing board of five or more members, including local representation and demonstrated oversight through regular meetings and committee structure.

7. IRS Form 990 Compliance

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

8. Expense Ratio Standards

Fundraising and management expenses should not exceed 25% (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-compliant audit with an unqualified opinion for the most recently completed fiscal year.

10. Non-Discrimination Policy

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

12. Measurable Outcomes

The agency must track and report measurable outcomes demonstrating program effectiveness, including baseline data, targets, and results aligned with the Town of Palm Beach United Way's impact areas of education, health, and financial stability.