

ANNUAL COMMUNITY INVESTMENT PROCESS

Each year, local nonprofit agencies apply to become Certified Partners of United Way of West Florida (UWWF). Through this process, UWWF reviews each applicant agency's financial records and nonprofit status to ensure that the agency is following non-profit best practices, as well as federal and state regulations. Once certified, agencies can apply for Community Investment grant funding. The source of this funding is undesignated donations.

Each spring, as we prepare for the Community Investment Process, UWWF donors (of any amount) volunteer to serve as Community Investment Panelists. These volunteers are trained to review agency applications, oral presentations, and collectively determine which programs receive funding.

AGENCY CERTIFICATION - AGENCIES MUST PROVIDE THE FOLLOWING:

Opens in January

- Agency Bylaws
- Current FL Charitable Solicitation Registration, if required
- Non-Discrimination / DEI Policy
- Summary of internal controls

- Most recent audited or reviewed financials
 - Agencies with under \$500,000 in revenue may provide internal financials
- Most recent Form 990

*Training on Certification Process is available



COMPLETED APPLICATIONS REVIEWED BY UWWF'S FINANCE COMMITTEE.

October to December Finance Committee makes final decisions

AGENCIES NOTIFIED OF APPLICATION STATUS.

Approved to be a Certified Agency Partner or Declined. Agency is provided feedback

COMMUNITY INVESTMENT GRANT OPENS TO CERTIFIED AGENCIES.

Opens in January Applicant Training sessions are mandatory

AGENCIES

COMMUNITY INVESTMENT VOLUNTEERS ARE RECRUITED AND TRAINED.

Approx. 30 volunteers serve on one of three panels: **Health, Education, and Financial Stability** for ~25 volunteer hours

March

VOLUNTEERS REVIEW AND SCORE APPLICATIONS AND AGENCY ORAL PRESENTATIONS.

March to April

PANELS DELIBERATE AND IDENTIFY FUNDING PRIORITIES.

April

PANEL CO-CHAIRS MEET WITH COMMUNITY INVESTMENT COMMITTEE CHAIR AND VICE-CHAIR TO REVIEW PANEL FUNDING PRIORITIES.

May

COMMUNITY INVESTMENT COMMITTEE CHAIR & VICE-CHAIR REVIEW HEALTH, EDUCATION, AND FINANCIAL STABILITY FUNDING RECOMMENDATIONS WITH COMMUNITY INVESTMENT COMMITTEE.

May

COMMUNITY INVESTMENT COMMITTEE REPORTS RECOMMENDATIONS TO EXECUTIVE COMMITTEE.

May

CI VOLUNTEERS

EXECUTIVE COMMITTEE REPORTS TO UWWF BOARD WHICH MAKES FINAL DECISIONS ON AWARDS.

Late May



For more information on Community Investment please reach out to our Director of Community Impact, Mary Zaledonis at mary.zaledonis@uwwf.org. Sign up for our newsletter at uwwf.org to keep up to date with what's happening with UWWF.

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uwwf.org/community-investment-process

United Way
of West Florida

