



2024 United Way of Otter Tail & Wadena Counties

Directions:

- Please fill out application via the fillable .pdf form and either mail in or drop off the required documents listed below to: JWOTW, 120 East Washington Ave, Fergus Falls MN, 56537.
- Email a complete application and all requested documentation in a PDF form to unitedwayotw@uwotw.org
- One application packet per program and/or county is required (each panelist at your presentation receives an application packet to review)
- Missing or incomplete application packages will not be accepted.
- Deadline for application package is Friday, February 9, 2024, at 2:00pm.
- For questions, please call our office at 218-736-5147

Please provide 1 copies of each document

- ___ PDF file of all required documents and applications emailed to unitedwayotw@uwotw.org
- ___ Community Investment Grant Application (Signatures required)
- ___ Organization budget and budget of program being applied for if different than overall organization
- ___ List of Board Members and their affiliations
- ___ Most recent audited financial statements, current balance sheet and current profit & loss statement

Please provide 1 copy of each of the following documents

- ___ Most recent Form 990
- ___ IRS Determination Letter – 501c3 Status
- ___ A copy of your organization’s Anti-Discrimination Policy if available
- ___ Counterterrorism Compliance Document (Provided - Signature required)

2024 UW OF OTTER TAIL & WADENA COUNTIES FUNDING CRITERIA

United Way seeks proposals that improve lives by mobilizing the caring powers in our communities. We strive to accomplish our mission by uniting citizens and agencies to plan, support and deliver effective human service programs.

This United Way only invests in not-for-profit programs directly benefiting human beings. **United Way of Otter Tail & Wadena Counties strategic initiatives include:**

- Providing resources to persons living in poverty which will remove barriers to success and a provide a way out of poverty.
- Early childhood development and early literacy.
- Reducing the stigma of mental health disorders and promoting mental health resources.
- Reducing food insecurities for residents living in poverty in Otter Tail & Wadena Counties.
- Creating awareness of Human Trafficking/Sexual Exploitation in Otter Tail & Wadena Counties and providing prevention education support.
- Working with our communities to uncover childcare solutions.

Individuals served by United Way funded programs will maintain or improve their standard of living, independence, health and safety. They will experience an improved quality of life by realizing their potential in social, vocational, and interpersonal environments. They will experience stable and/or improved physical and emotional health. Funding for this application cycle will be paid quarterly beginning 9/30/2024 and ending June 30, 2026.

The following guidelines are to be reviewed before applying for funding from United Way of Otter Tail & Wadena Counties.

Criteria for program funding:

- Applications must be received at the United Way of Otter Tail & Wadena Counties office, in Fergus Falls by 2:00pm, Friday, February 09, 2024. **Applications received after this date will not be considered for funding.**
- To the extent possible under existing state and federal law, programs receiving United Way dollars have been declared tax exempt by the Internal Revenue Service and must be a not-for-profit 501(c)(3) organization conducting a health and human service program or a public agency/unit of government.
- The organization must be a 501(c)(3) tax-exempt organization for 12 months preceding the application.
- Program requests should be based on an identifiable current need, demand or problem in Otter Tail or Wadena Counties. (Identifiable through local county and state agency needs assessments)
- United Way does not invest in the **arts, research, public policy, or animal issues.**

- United Way dollars may not be used for remodeling, renovation, expansion, or construction.
- The agency/program applying must have updated bylaws and an active Board of Directors who consist of volunteers that participate in the policy making process, represent the diverse elements of the community, adhere to a rotation policy which clearly specifies a period members are excused from attendance and voting, and meet at least quarterly with a quorum. Board members cannot receive financial remuneration from the program they oversee.
- The agency/program applying must have a stated mission, vision, and strategic plan.
- The agency/program applying must demonstrate financial management - all financial statements must show evidence of accounting principles in accordance with Generally Accepted Accounting Procedures and include full disclosures and appropriate notes for such things as leases, loans, investments and affiliated party transactions. Agencies/programs must have an annual audit if the agency has gross receipts of \$300,000 or more; an audit or review if the agency has gross receipts of \$25,000 but less than \$300,000; an audit, review or compilation if the agency has gross receipts of less than \$25,000.
- The agency's most recent audit has reported an **unmodified or clean opinion**; that is, the auditor does not qualify or restrict his opinion regarding any significant matter found during the audit.
- The agency/program is not under current investigation for fraud or other illegal activity.
- The agency/program applying must have and follow a policy of non-discrimination and non-segregation on the basis of race, sex, age, physical and mental handicap, religion, or any other protected class regarding its governing body, employees and persons served.
- The agency/program is willing to provide an outcomes report to United Way, annually. This will be required at the end of December for each program receiving funds. Forms will be provided. These reports will assist United Way in determining the impact and effectiveness of the programs in building a healthier community.

PRIORITIES FOR FUNDING – How does your program align with United Way's Initiatives?

- EDUCATION: Programs which help children and youth achieve their potential by supporting the learning, development and sense of belonging of children and youth so they become responsible and contributing adults.
- INCOME: Programs which promote financial stability and independence to ensure the basic needs of food, housing, clothing and safety.
- HEALTH: Programs which improve people's health status through higher levels of positive health, lower levels of disease and/or improved quality of health and life.