



CHECKLIST AND IMPORTANT INFORMATION FOR APPLYING FOR UNITED WAY OF BEMIDJI AREA PARTNER AGENCY INVESTMENT APPLICATION

1. Agencies seeking partner funding from the United Way of Bemidji Area **MUST MEET THE “BASIC CONDITIONS OF FUNDING”** (see page 1).
2. **APPLICATION DEADLINE** - The completed application must be received at the United Way of Bemidji Area office, PO Box 27, 716 Paul Bunyan Dr NW, Bemidji, MN 56619, **OR** grants@unitedwaybemidji.org, by 5:00 p.m. on **Friday, March 29, 2019.**
3. Applicants will be notified of grant results in mid-June 2019.
4. United Way investments are paid to Partner Agencies on a quarterly basis in July, October, January and April.

Agency’s packet must include (if emailing, send each in SEPARATE PDF files):

- 1 completed **SUMMARY INFORMATION** form (*below*)
- 1 completed **AGENCY BUDGET** form and requested schedules (*download excel doc.– agency budget*)
- 1 signed **AGENCY PARTNERSHIP AGREEMENT** (*below*)
- 1 **agency brochure** (if applicable)
- Most recent available copy of charities registration approval letter from State of MN Office of Attorney General** stating they received your annual report and that your organization’s registration has been continued pursuant to Minnesota Statutes chapter 309, the Charitable Solicitations Act. If exempt from registration, submit a reason for exemption. *Minnesota law requires a charitable organization to file a registration statement if: 1) it solicits or intends to solicit contributions in excess of \$25,000 a year; or 2) its functions and activities are not performed wholly by volunteers (i.e. it pays staff, independent contractors (like coaches), officers or uses a professional fundraiser); or 3) it has assets or income that inure to the benefit of an officer.*
- Copy of 501(c)(3)** – *unless* already on file in the United Way office (please contact the United Way if you are unsure if it is on file), or if there were changes in your status since last year
- Copy of By-laws** – *unless* already on file at the United Way office (please contact the United Way if you are unsure if it is on file), or if changes were made since last year
- Copy of most recently completed Audit report** – If an Audit is not required, submit your financial statement as approved by your Board of Directors complete with statements, schedules and notes.
- Copy of most recently completed IRS Form 990, 990-N (E-postcard) or 990- EZ.** If exempt from filing a 990, submit a reason for exemption.

FAILURE TO INCLUDE ANY OF THIS INFORMATION COULD RESULT IN REJECTION OF YOUR APPLICATION. A completed application is not a guarantee of funding. If you have any questions, contact United Way at (218) 444-8929.