

Agency Application Questions

1. Agency Name
2. Physical Address
3. Mailing Address (if different than physical address)
4. Website link
5. Social Media Handles
6. EIN Number
7. Chief Professional Officer
8. Chief Professional Officer Phone Number
9. Chief Professional Officer Email
10. Chief Volunteer Officer
11. Chief Volunteer Officer Phone Number
12. Chief Volunteer Officer Email
13. What is your organization's mission statement?
14. What is your agency's Non-Discrimination/Diversity, Equity & Inclusion statement?
15. United Way fights for the Health, Education & Financial Stability of every person in our community. Does your agency have additional programs in the pipeline that relate to our mission?
16. Board and Staff Demographic data:
 - a. BOARD
 - i. Total number of board members
 - ii. What percent of your board gives to your agency?
 - iii. Percent male, female, trans/non-binary/third gender
 - iv. Percent White (not Hispanic or Latino), Hispanic or Latino, Black or African American, Asian, American Indian or Alaska Native, Native Hawaiian or other Pacific Islander, Other
 - b. STAFF
 - i. Total number of board members
 - ii. What percent of your staff donates to your agency?
 - iii. Percent male, female, trans/non-binary/third gender
 - iv. Percent White (not Hispanic or Latino), Hispanic or Latino, Black or African American, Asian, American Indian or Alaska Native, Native Hawaiian or other Pacific Islander, Other

17. Date of prospective employee giving campaign

Required Documents

- Agency Organization Chart
- List of Board of Directors
- Budget Packet
- IRS Tax-exempt 501c3 Determination Letter
- Current Certificate of Fidelity/Employee Dishonesty Insurance
- Certificate of Solicitation (if expired, a copy of Form PC Application-in-Progress)
- Current Copy of Agency By-Laws
- Copy of Annual Audit or Year-End Financials (Annual budgets >\$100,000 must submit an Annual Audit. Annual budgets <\$100,000 may submit a Year-End Financial Statement.)
- IRS Form 990 (pages 1-11)
- Copy of minutes from most recent Annual Meeting
- Annual Report from the prior fiscal year
- Agency's Affirmative Action Plan (updated to include ADA requirements)
- Form ST-2 Certificate of Exemption