

ORGANIZATION INFO | Strategic Investment Grants FY26-28

PROGRAM DEADLINE: January 13, 2025 at 04:00 PM EST

Organization Information

Organization Overview

Organization Name *

Tax ID or EIN *

Fiscal Agent (if applicable) - Name, EIN, Contact Info

Mailing Address *

Mailing City, State ZIP *

Phone *

Website *

General Organization Email *

Social Media Links

Mission *

Max Number of Words: 100

Year Founded *

Proof of 501(c)3 status, educational institution, or public entity *

Select File

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Maximum File Size: 10MB

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Counties Served (select all that apply) *

- Hancock
- Penobscot
- Piscataquis
- Somerset
- Waldo
- Washington
- Other

of Staff *

of Volunteers *

Board Info

Board List *

Select File

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If public entity, please attach list of elected or volunteer individuals overseeing program operations.

Does your Board of Directors have a minimum of three voting members who are not related to each other? *

*

No

Yes

Does your Board of Directors have a minimum of four evenly spaced meetings per year of the full governing body with a quorum in attendance? *

No

Yes

CEO/Executive Director/President Contact

Name *

Title *

Email *

Phone *

Finance Contact

Name *

Title *

Email *

Phone *

Financial Info

Organization Finance

Organization must provide:

Gross receipts of \$500,000 or more = Annual Audit

Gross receipts of \$25,000-\$500,000 = Independent Review of Financial Statements from an external accountant OR Audit

Gross receipts of less than \$25,000 = Compilation OR Independent Review OR Audit

Note, some organizations may not currently have independent reviews or audits. This alone does not disqualify the organization. Our CFO & financial review panels will evaluate the financial materials you provide and request further information as needed.

Please contact grants@homeunitedway.org with any questions or concerns

Have you filed an IRS Form 990 for your most recent fiscal year end? *

- No
 Yes

Most recent IRS 990 *

Select File

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Maximum File Size: 10MB

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Password for file, if necessary

What is the date of your most recent audit or financial review? *

Clear

Most recent audit or financial review

Select File

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Were there any concerns or recommendations as a result of your most recent audit or financial review? Specifically, did you have findings in the form of a Management Letter or other document. Please explain.

What is your basis for accounting? *

- Accrual
 Cash

What is fiscal year end date? *

Do your internal financial statements conform to GAAP (Generally Accepted Accounting Principles)? *

- No
 Yes

Current Organization Budget *

Select File

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Agency's most recent year end:

Total revenue (IRS Form 990 Part VIII, Line 12 Column A or IRS Form 990 EZ Part I, line 9): *

 \$

Management and general costs (IRS Form 990 Part IX, Line 25, Column C or IRS Form 990 EZ Part I, line 17): *

 \$

Fundraising costs (IRS Form 990 Part IX, Line 25, Column D):

 \$

Cash Balance (Financial Statements or IRS Form 990 Part X, Line 1 & 2 or IRS Form 990 EZ Part II, line 22): *

 \$

Revenue less Expenses (IRS Form 990 Part XI, line 3 or IRS Form 990EZ Part I, line 18): *

 \$

Over the past three years, if there are significant changes, or a negative change, please explain: *

Max Number of Words: 100

Based on your most recent form 990 or year-end financial statement, what is the percentage of management and general expenses compared to total expenses? *

 %

(0 to 100)

If your agency's management and general expenses are less than 10% or greater than 25% please explain why.

Is there anything else you would like to explain or more information you would like to provide about your financial statements or results of your most recent year end?

Sign & Submit

Digital signature:

In submitting this application to Heart of Maine United Way, I certify that all of the information provided is complete and accurate to the best of my knowledge and that I am authorized to submit an application on behalf of my organization. If awarded a Strategic Investment Grant, my organization will acknowledge HoMEUW's partner status in communications relevant to the project. This may be accomplished via displaying the HoMEUW logo on printed materials, websites, newsletters, social media, offices, etc., as well as in press releases, public service announcements, and other contacts with the media.

Please type your full name below as a digital signature.*