



## OTTO BREMER TRUST COMMUNITY RESPONSIVE FUND APPLICATION QUESTIONS

The purpose of this document is to help applicants prepare to apply for the full Otto Bremer Community Responsive Fund grant application. Full applications are by invitation only; only applications and supplemental documentation submitted in the Grants Portal will be considered.

Several questions within the application have firm character limits (including spaces) set by the Otto Bremer Trust. Please use character count tools to ensure you are staying below the limit.

This document includes additional explanation and commentary.

### ELIGIBILITY

Eligibility criteria for OBT Community Responsive grants through UW Valleys are:

- The work must align with the OBT Community Responsive Fund focus areas for 2026.
- The organization must be located and doing work in 6-county region, Burnett, Dunn, Pierce, Pepin, Polk and/or St. Croix Counties; a majority of people served by the organization must live in the six-county region.
- Beneficiaries of the grants must reside in Minnesota, Montana, North Dakota, and/or Wisconsin.
- The organization must have a 501(c)(3) determination from the IRS. (Government entities, including public schools, are not eligible. Non-public schools are eligible.)
- The organization must have at least five years of successful operations during which they have continuously held 501(c)(3) status.
- The organization must complete annual audited financial statements prepared by an independent CPA.
- The organization's last fiscal year's actual expenses must have been \$2 million or more, excluding in-kind expenses.
- Grant funds are not to be used for work to influence public policy, annual events, event sponsorships, or fiscal sponsorships.
- The organization may not have an open OBT strategic grant.

### GRANT TERMS

- Maximum grant award is \$75,000
- Grants cannot be more than 10% of organization's philanthropic revenue (revenue less government funding, earned income, investment gains, fee for service, and in-kind contributions)
- Funds will be restricted to activities within the focus area. Up to 10% is permitted for administrative costs
- Grant period is anticipated to start October 1, 2026, for a period of one year
  - Funds released mid October, 2026
  - Final grant report due: July 31, 2027; Grant term ends: September 30, 2027

**DEADLINE TO APPLY: JUNE 22, 2026, 4:00PM**

### APPLICATION TABLE OF CONTENTS

**PART 1 – AGENCY INFORMATION**

**PART 2 – FINANCIALS**

**PART 3 – PROGRAM INFORMATION**

**PART 4 – UPLOADS & SUBMISSION**

**PART 5 – COMPLETE**

***Disclaimer: UW Valleys reserves the right to modify or update content at its discretion without prior notice.***

## PART 1 – AGENCY INFORMATION

1. Agency's Name
2. EIN
3. Years in Existence: \_\_\_\_ (numerical answer)
4. Physical Address, City/State/Zip
5. Website

### 6. PRIMARY CONTACT INFORMATION

- First & Last Name
- Email Address
- Phone

### 7. CEO CONTACT INFORMATION

- First & Last Name
- Email Address
- Phone

### 8. Purpose Statement (255 characters)

*Note: OBT requires concise purpose statements that articulate alignment with the focus area(s). Purpose statements have a character limit of 255 characters.*

### 9. What community or geographic area within United Way St. Croix and Red Cedar Valley Service Area (Burnett, Dunn, Pepin Pierce, Polk, and St. Croix counties) does your organization serve?

*(Check box)*

### 10. Please list any additional counties served outside the UW Valleys six-county region, if applicable.

11. Number of Full Time Employees: \_\_\_\_\_ (numerical answer)

12. Number of Part-Time Employees: \_\_\_\_\_ (numerical answer)

## PART 2 - FINANCIALS

Funding Level under consideration will be determined based on the financial information and review of financial documentation provided.

**Use of Grant Funds:** Ninety percent of grant funds are restricted to programs and direct services that align with the focus areas. Note that the grant funds may be utilized by multiple programs so long as the activities align with the focus areas. Ten percent of grant funds are unrestricted and may be used to support administrative expenses (e.g., indirect costs) or may be used for programs and direct services that align with the focus areas.

**Administrative Expenses:** include management and general expenses and fundraising expenses, which are consistent with Form 990 (Part IX, Statement of Functional Expenses). No, administrative expenses through the OBT Community Responsive Fund are not additional expenses beyond traditional indirect expenses.

**Public Philanthropic Financial Support is Defined as:** dollars raised through private fundraising (individuals, businesses, foundations, etc.), giving campaigns, fundraising events, United Way awards, and so forth. It excludes government grants and contracts, earned income, investment gains, and so forth. In-kind contributions (e.g., donated or rescued food, volunteer hours, etc.) are also excluded.

1. **Previous FY Actual Revenue:** \_\_\_\_\_ (numerical answer)

2. **Previous FY Actual Expenses:** \_\_\_\_\_ (numerical answer)

The legal entity receiving grant funds must have had previous fiscal year's actual expenses of more than \$2 million; Coalitions are not eligible.

3. **Previous FY Public Philanthropic Financial Support:** \_\_\_\_\_ (numerical answer)

Part VIII, Lines 1a, 1c, and 1f. (Noncash contributions from line 1g should not be included in your calculation.)

4. **Grant Amount Requested:** \$ \_\_\_\_\_

Grants cannot be more than 10% of organization's philanthropic revenue (revenue less government funding, earned income, investment gains, fee for service, and in-kind contributions)

## PART 3 – PROGRAM INFORMATION

1. Program Name

2. Current Total Annual Program Budget: \_\_\_\_\_ (numerical answer)

3. Primary Impact Area (Please select 1)

- Food                       Low Income Healthcare Clinics                       School Based Mental Health  
 Shelter                       Disability Services

### IMPACT AREA DESCRIPTION

**Food:** Organizations and programs that directly operate meal sites and food pantries to meet basic daily needs.

- Large, region and state-wide food bank activities are not included; large-scale food storage and distribution center activities that primarily function to supply food to other local organizations are not eligible.
- Direct meal site and food pantry services are eligible for consideration.
- The intent of the focus area is that hunger relief efforts are a major emphasis of the organization's work.
- Meal programs at daycare centers and other day programs are **not** eligible.

**Shelter:** Organizations and programs that provide short-term and emergency shelter beds for people who are housing insecure or facing homelessness.

- Short-term and emergency shelter beds are described in the focus area of shelter. Does this focus area allow for providing hotel stays when shelters are full, or providing hotel stays in rural areas where a stand-alone emergency shelter does not exist? Yes, both examples are eligible.

**Low Income Healthcare Clinics:** Organizations and programs that primarily provide affordable medical, dental, and mental health services to people with limited financial resources or who are uninsured/underinsured.

- Government-owned hospitals or joint-powers healthcare systems are not eligible, however, affiliated 501(c)(3) hospital and healthcare foundations may be eligible.
- The grant could be made to either the hospital or its related foundation. If the grant is made to the foundation, please list the foundation as the grantee, but input financial information for the hospital/clinic. Include an explanation/note in the entry, so it is clear to the Otto Bremer Trustees when they are providing input.
- It is acceptable practice to assess hospitals utilizing the financials of both the hospital and its foundation. The hospital's expenses may be used to determine eligibility regarding prior fiscal year actual expenses. The hospital foundation's revenues may be used to determine public philanthropic financial support.
- The focus area of low-income healthcare clinics suggests the emphasis is on charitable clinics and safety net providers. Would programs and services specifically targeted to low-income communities be eligible for consideration, even if they are provided by a larger healthcare system whose sole focus is not low-income healthcare? **Yes.**

**Disability Services:** Organizations and programs that support people with physical/cognitive disabilities.

**School Based Mental Health:** Organizations and programs that have established school-based mental health services.

- Provide clinical school-based mental health services (therapy or group therapy) provided by licensed mental health professionals.
- Colleges and Universities, Head Start, early learning, and similar programs are not eligible; pilot programs are not eligible.

4. Summary of the Proposed Work (500 characters)
5. Proposed Narrative & Desired Outcomes (4000 characters)
6. Number of unduplicated individuals served by program in the last 12 Months: \_\_\_\_\_ (numerical answer)
7. List other secured funding sources and amounts for this program.
8. Do you partner with any local organizations on these programs and/or services?
9. What else would you like us to know about your program?

## **PART 4 – UPLOADS & SUBMISSION**

- Upload your Program Budget
- Upload your Agency Budget
- Upload your most recent 990
- Upload your most recent audited financial statement prepared by an independent auditor/CPA
- Upload your 501(c)(3) IRS Determination
- Upload your Board of Directors list
- Optional: Additional Supporting Documentation

## **PART 5 – COMPLETE**

- Signature

---

**For questions related to the Otto Bremer Community Responsive Fund Grant Process,  
please contact: Megan Hausch, Director of Development, [megan.hausch@uwvalleys.org](mailto:megan.hausch@uwvalleys.org)**