

LIVE UNITED



United Way of York

April 17, 2017

Attached is the Application Packet for Member Organizations that wish to apply for financial support during the year 2018. Items listed in bold must be filled out completely and returned to unitedwayofyork@gmail.com or United Way of York, PO Box 295, York, NE 68467. All applications must be postmarked no later than May 8, 2017.

Attachments included:

- United Way of York Mission Statement (for your records)
- United Way of York Admission Policy (for your records)
- Member Agency Agreement (for your records)
- **Counterterrorism Compliance Form [NOTE: We must retain a physical copy with an original signature. Please print and sign this form and return by mail.]**
- **2018 Funding Application**

In addition to the attached forms, please include the following:

- **Current Financial Statement**
- **IRS 501(c)(3) Determination Letter**
- **Report detailing how last year's funds were used**
- **Statement of history, purpose, & goals***
- **Special Fundraising/Campaign plans***
- **Statement of how funds will be used***
**if not included in the body of the application*
- **Current action photo of your agency**
(for possible use in a Power Point presentation, newspaper articles, and on our webpage)

A determination of allocation will be made within the constraints of our annual United Way budget. A letter stating that determination will be sent to you in July.

The Board may also call upon some of the Member Organizations which receive funding, to supply speakers prior to and during our annual United Way of York fundraising drive, or to assist with fundraising goals. We believe that by facilitating presentations to various businesses and community groups, we can promote a better understanding of the benefits associated with the member organizations and the United Way of York. Hopefully, this will translate into a greater level of support for the drive. Please give some thought to who could represent your organization and to what type of program and message your member organization would want to deliver.

If you have questions, please contact us at unitedwayofyork@gmail.com.

Sincerely,

United Way Board of Directors

United Way of York
Mission Statement

United Way of York provides a not-for-profit area-wide effort to voluntarily raise and allocate funds efficiently and effectively to help meet the needs of the community. We strive to bring a diverse people and their community resources together, under one heading, to address the urgent needs necessary in providing human services that will better enhance our total community. United Way's sole objective is to eliminate the overwhelming number of individual solicitations businesses receive from the member organizations currently being served by United Way of York. We do this by hosting one annual fundraising event, per year, that allows us to form unique partnership with local businesses, who can make a yearly donation that will impact the entire community at large.

United Way of York pledges to mobilize these resources through all our community-based member organizations, dedicated to making a difference in helping children and youth succeed, strengthening and supporting families, promoting self-sufficiency, building vital and safe neighborhoods, and supporting vulnerable and aging populations.

Thank you for supporting our community and for encouraging our efforts to serve you as United Way of York.

Admission Policy

United Way of York strives to maintain an open door policy for the admission of new member organizations while continuing to support viable existing affiliated organizations. The basic criteria for admission are: 1) the ability to demonstrate that the organization is meeting a significant health or social service need in the community that is not currently being met by an existing organization; 2) non-discriminatory in service delivery, selection of volunteers and staff; 3) organized as a nonprofit, private corporation qualifying for 501(c)(3) status from the Internal Revenue Service; 4) proof of fiscal accountability and operational stability; and 5) agrees to comply with all United Way policies.

Admission Standards to Support Admissions Policy

Any charitable, philanthropic, benevolent, health, youth, social welfare and like organization may be considered for membership as a Member Organization on formal application to United Way upon admission of such evidence as may be required to satisfy United Way that:

1. Its object, purposes, services and program serve an established and well-recognized need of the residents of the York Area in the fields of health and social services.
2. It is, to the extent possible under existing state and federal law, qualified as an organization exempt from taxation by federal income taxes so that contributions made to it are tax deductible.
3. It has demonstrated community support.
4. It will, if admitted, furnish United Way with adequate data as to contributions received from the public in the recent past, so that a master control list may be compiled for use in campaign.
5. It does not materially overlap or conflict with a program service being rendered by any other organization.
6. It is governed by a voluntary, responsible, and representative group of citizens.
7. It is financially sound and operated in an efficient and economic manner.
8. It has a satisfactory rating by accepted and approved standards for the conduct of such a program.
9. It will, if admitted, execute an annual contract with United Way as will each other Member Organization.

The application of any organization for admission shall be first reviewed by the Evaluation Committee and its recommendation shall then be submitted to the Board of Directors. Approval of two-thirds (2/3) of the members of the Board of Directors present at two (2) consecutive meetings shall be required for admission. Approval will be based on a number of factors, including United Way resources, how closely the organization and program meet the documented social service needs of the community, whether other organizations provide similar programs (since duplication of services is strongly discouraged), and the financial viability of the organization. After approval, such an organization shall, upon executing this uniform Agreement, become a Member Organization.

Member Agency Agreement and Application

Whereas, the United Way of York (United Way) exists for the purpose of providing a single, unified source of raising and dispersing contributions to assist in meeting social service needs of the York area;

Whereas, the undersigned participating organization (Member Organization) is qualified to receive deductible charitable contributions under Section 501(c)(3) of the Internal Revenue Code of 1954, as amended; and

Whereas, the United Way and Member Organization desire to enter into an Agreement to set forth the respective responsibilities of said entities as hereafter set forth.

The United Way and the Member Organization agree as follows:

1. Both parties hereby acknowledge that the Member Organization shall retain its distinct identity, administer its own affairs, and establish, maintain and pursue its own internal policy, but shall at all times be in compliance with the uniform rules, regulations and standards which may from time to time be prescribed by the United Way of York Board of Directors.
2. Member Organization agrees to accept the apportionment of funds approved by the United Way Board of Directors.
3. Member Organization agrees to maintain a responsible management with a rotating Board of Directors or Administrative Committee of responsible and reputable residents, which shall meet on a consistent basis throughout the year.
4. Member Organization agrees to cooperate with other social agencies to prevent duplication of effort and promote efficiency and economy of administration.
5. United Way agrees to conduct a comprehensive fund raising campaign on an annual basis. The United Way agrees to, throughout the year, promote the interest and work of all participating organizations that derives financial support through the United Way campaign.
6. Member Organization agrees to give its full and active support to the campaign on an annual basis by participating in our "Buddy System," of providing volunteer members, board members, or professional staff, to help with the solicitation efforts of the annual campaign.
7. Member Organization shall clearly state their relationship with United Way in all print and electronic media used to communicate with the public. Examples of such identification include, but are not limited to: displaying the United Way logo on agency/program stationary and newsletters, referring to United Way as a funding source in public service announcements and slide presentations, and displaying the United Way logo on agency buildings or office doors.

8. In keeping with the accordance of the purpose of the United Way of York to eliminate the business solicitations by the many various member organizations by performing one combined fundraising campaign on an annual basis:

Permission for outside fundraising must be obtained from the United Way of York Board of Directors PRIOR to the Member Organization soliciting funds.

Member Organization agrees that it will not hold organized campaigns involving direct business solicitations. Exceptions will be made if soliciting a business results in the benefiting of the business by furthering the business' exposure. For example, if an area business wished to be associated with a certain event and their contribution results in a direct affiliation to that event allowing them the opportunity to benefit their business (e.g. advertise), consideration will be given to that event.

The fundraising events listed on page 2 of the Funding Application, as well as any other events planned later in the year, must be approved by the Board of Directors in an attempt to maintain the integrity and fairness of the United Way of York and it's member organizations.

9. The Member Organization agrees to submit to the United Way a financial and activity statement in conjunction with the allocation process thereby presenting just need for their continued requests.
10. This agreement shall be renewed each year between the participating Member Organization and the United Way of York. The signed agreement for the following year must be submitted by the Member Organization at the time their request for funds are submitted to the Evaluation Board for consideration.

COUNTERTERRORISM COMPLIANCE

In compliance with the spirit and intent of the USA PATRIOT Act and other counterterrorism laws, the United Way of York requests that each funded agency ("Organization") certify that it is in compliance with the United Way of York and the United Way of America's ("UWA") compliance program.

ORGANIZATION NAME: _____

Check the Appropriate Box to Indicate Your Compliance With Each of the Following:	Comply	Do Not Comply
This Organization is not on any federal terrorism "watch lists," including the list in Executive Order 13224, the master list of specially designated nationals and blocked persons maintained by the Treasury Department, and the list of Foreign Terrorist Organizations maintained by the State Department.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not, will not and has not knowingly provided financial, technical, in-kind or other material support or resources* to any individual or entity that is a terrorist or terrorist organization, or that supports or funds terrorism.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not, will not and has not knowingly provided or collected funds or provided material support or resources with the intention that such funds or material support or resources be used to carry out acts of terrorism.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not, will not and has not knowingly provided financial or material support or resources to any entity that has knowingly concealed the source of funds used to carry out terrorism or to support Foreign Terrorist Organizations.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization does not regrant to organizations, individuals, programs and/or projects outside of the United States of America with out compliance with IRS guidelines.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization takes reasonable, affirmative steps to ensure that any funds or resources distributed or processed do not fund terrorism or terrorist organizations.	<input type="checkbox"/>	<input type="checkbox"/>
This Organization takes reasonable steps to certify against fraud with respect to the provision of financial, technical, in-kind or other material support or resources to terrorists and terrorist organizations.	<input type="checkbox"/>	<input type="checkbox"/>

* In this form, "material support and resources" means currency or monetary instruments or financial securities, financial services, lodging, training, expert advice or assistance, safehouses, false documentation or identification, communications equipment, facilities, weapons, lethal substances, explosives, personnel, transportation, and other physical assets, except medicine or religious materials.

I certify on behalf of the Organization listed above that the foregoing is true.

Print Name: _____

Title: _____

Signature: _____

Date: _____

Please complete this form and return to United Way of York, PO Box 295, York NE 68467

United Way of York
P.O. Box 295
2018 Funding Application

Date submitted _____

Name of Member Organization _____

Mailing Address _____

Contact _____ Phone _____

E-mail Address _____

Web page (will link to UW York webpage) _____

Does your organization have a 501(c)(3) Determination Letter from the IRS? Yes No

If you answered no, are you covered under a parent organization? Name of that organization:

Number of individuals your agency serves in the City of York/York County _____

I have read and agree to the United Way of York Application Policy and Agreement.

Signature of Member Organization Representative

<u>Organization Officers</u>	<u>Name</u>	<u>Address</u>	<u>Phone</u>
President	_____		
Vice President	_____		
Secretary	_____		
Treasurer	_____		

Bank of Member Organization _____

**NOTE* Funds approved, must be deposited into an account established in the name of the member organization and not into a personal account*

Statement of organization's history, purpose and goals, including how these goals are carried out, whom and how many individuals benefit from your services:

(Attach sheet if necessary)

Amount of funds requested: \$ _____

How will these funds will be used?

Refer to item #8 on the Member Agency Agreement and Application for more details regarding acceptable fundraising activities. Please list all fundraising activities currently planned for the upcoming year. Include event, date of event, means of fundraising, and projected income.

(Attach sheet if necessary)

Activity	Date	Means of Fundraising	Income
1. _____			
2. _____			
3. _____			

Total amount budgeted for your organization, for the 2015 fiscal year.

\$_____.

For use by the **United Way of York Evaluation Committee:**

Information Checklist

- | | |
|---|--|
| <input type="checkbox"/> Completed Application | <input type="checkbox"/> Special Campaigns Plan |
| <input type="checkbox"/> Statement of history, purpose, & goals | <input type="checkbox"/> Financial and Activity Statement |
| <input type="checkbox"/> Report detailing last year's funds use | <input type="checkbox"/> Statement of how funds will be used |
| <input type="checkbox"/> IRS 501(c)(3) | |

 Held interview with Organization representatives? Yes No Date _____.

Request for additional information? Yes No Date _____.

All information furnished by Member Organization? Yes No Date _____.

Comments:

Recommendation of Evaluation Committee:

Agree to Fund: Yes No

If Yes, Recommended amount \$ _____

If No, Reason: _____

Action of the **United Way of York** Board of Directors:

Accept Decline

Date _____

All applications **MUST** be postmarked by May 8, 2017 and returned to
United Way of York
 P.O. Box 295
 York, NE 68467
 Or
 unitedwayofyork@gmail.com

