



United Way of York

April 1st, 2023

Hello,

As a working board, we strive to develop new strategies to reverse the trend of declining pledges in recent years. We continue to make efforts to increase awareness of our impact on the York community and would like to include you in what we have implemented and our plans to grow.

In 2022 we changed the status of our member agencies to partner agencies. We believe we must partner with each agency in raising awareness and raising funds to be successful in our common goal, giving back to the community of York.

As your organization considers applying for United Way funding in 2024 please be aware that as a partner we ask for your commitment to work with us. Included in this packet is a Partner Agency Commitment Letter outlining the opportunities for agencies to raise awareness for your agency and support the United Way campaign. Please review this letter before submitting your application.

In exchange, the United Way of York will provide you with a United Way badge to display on your website and social media. The United Way will also list/link your organization on our partner agencies webpage.

Currently we accept online payments, accept Venmo donations, and promote fundraising and our partner agencies on social media, host a kick-off luncheon, run a Split-the-Pot raffle, send a direct mailer to all homes located in the 68467 zip code and in 2022 added a Spring Carnival.

Included with this letter you will find several documents to help you as you consider your funding needs and a list of documents required to complete your funding application. If you have any questions about this process reach out to unitedwayofyork@gmail.com.

We are excited about the possibility of partnering with your agency in the coming year.

Thank you,

United Way of York



United Way of York

2024 United Way Partner Agency Packet Includes

For your records: *(pgs. 3-6)*

- United Way of York Mission Statement *(for your records)*
- United Way of York Admission Policy *(for your records)*
- Partner Agency Agreement *(for your records)*
- **(NEW) Partner Agency Commitment *(for your records)***

Required application documents:

- 2024 Funding Application *(pgs. 8-10)*
- Counterterrorism Compliance Form *(pg. 7)*
[NOTE: We must retain a physical copy with an original signature. Please print and sign this form and return by mail.]
- Current Financial Statement
- IRS 501(c)(3) Determination Letter
- *NEW-Background Check questions
- 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*

Return completed application form and other required documents to unitedwayofyork@gmail.com or United Way of York, PO Box 295, York, NE 68467.

All applications must be postmarked no later than May 1st, 2023

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 by August 1, 2023.

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

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 partner 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 partner 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.

United Way of York Admission Policy

United Way of York strives to maintain an open door policy for the admission of new partner 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 partnership as a Partner 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 Partner 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 Partner Organization.

Partner 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 (Partner 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 Partner 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 Partner Organization agree as follows:

1. Both parties hereby acknowledge that the Partner 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. Partner Organization agrees to accept the apportionment of funds approved by the United Way Board of Directors.
3. Partner 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. Partner 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 fundraising 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. Partner 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. Partner 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 partner 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 Partner Organization soliciting funds.

Partner 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 its partner organizations.

9. The Partner 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 Partner Organization and the United Way of York. The signed agreement for the following year must be submitted by the Partner Organization at the time their requests for funds are submitted to the Evaluation Board for consideration.

Partner Agency Commitment

The **United Way of York** exists for the purpose of providing a single, unified source of raising and dispersing contributions to assist in meeting the human service needs of the York area. We believe in partnering with local agencies to provide one annual fundraising event where the United Way Board of Directors and board volunteers reach out to the community through print and social media and local businesses and their employees.

United Way of York flourishes on the generosity of our donors and the cooperation of our agency partnerships. 98% of donor dollars are invested into local programs. It is to be expected that the United Way of York Board may call partner agencies, which receive funding, to supply volunteers during our campaign. **As a potential partner agency, which derives financial support through the United Way, we ask for your commitment to helping continue these efforts.**

The events we will call on our partners for assistance include:

1. Overall Campaign
 - a. We occasionally call on partner organizations to facilitate presentations to business and community groups to promote a better understanding of the benefits of supporting the United Way.
2. Kick-off Luncheon (August, 2023)
 - a. Provide your logo for our presentation during this event
 - b. Provide a photo of United Way funding in action at your agency
 - c. Attend the luncheon and network for your organization
 - d. Provide a volunteer to speak 2-3 minutes about your agency and how United Way supports your goals
3. Split the Pot raffle ticket sales (July/August, 2023)
 - a. Sell a minimum of 60 tickets
 - b. Promote the event to your members
 - c. Join us at a community event to help promote United Way and sell raffle tickets.
4. Spring Carnival (March, 2024)
 - a. Staff a booth
 - b. Assist with setup/tear down at the Auditorium
 - c. Provide props, games, prizes, or supplies
5. Support the United Way website and social media
 - a. Provide agency logo and contact information to be included in United Way promotions
 - b. Provide photos of United Way funds in action for online use by the United Way
 - c. Like and link the United Way posts through your online tools to further the reach of our campaigns

These events help us grow and raise awareness and ultimately give more to our agencies, and our communities. After the application and approval process is completed, we will be reaching out throughout the year to ask for help with these events. **We expect that you make your best effort in finding volunteers to support us in these endeavors.** Questions about the events can be directed to unitedwayofyork@gmail.com.

It is our pledge to help with your endeavors in serving our community. In turn, we appreciate your effort to help us serve as the United Way of York.

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 without 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, safe houses, 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: _____



2024 Funding Application
unitedwayofyork@gmail.com

P.O. Box 295, York, NE 68467

Must be postmarked by May 1st, 2023.

United Way of York

Name of Partner Organization:	
Mailing Address:	
Contact Name:	
Phone Number:	
Email Address:	
Web Address: <i>(UW will link on unitedwayofyork.org)</i>	
Does your organization have a 501(c)(3) Determination Letter from the IRS?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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.	Children: Adults:



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United Way of York

Do you have employees or volunteers?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If you answered Yes, how many?	
Do you require background checks on your employees and volunteers?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If you answered No, please explain why. Note: Your answer will not affect any funding decisions by the board of directors.	

Organization Officers	First and Last Name	Mailing Address	Phone Number
President			
Vice President			
Secretary			
Treasurer			



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Name of Partner Organization:	
Bank of Partner Organization: <i>(Funds approved, must be deposited into an account established in the name of the partner organization and not into a personal account)</i>	
Amount of funds requested:	\$
How will these funds be used?	
Total amount budgeted for your organization, for the 2023 fiscal year:	\$

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)

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)*

(Refer to item #8 on the partner Agency Agreement and Application for more details regarding acceptable fundraising activities.)

Activity	Date	Means of Fundraising	Income



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unitedwayofyork@gmail.com
P.O. Box 295, York, NE 68467
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United Way of York

Name of partner Organization: []

I have read and agree to the United Way of York Application Policy, Agreement and Commitment. (Pages 3-5)

Signature of Partner Organization Representative

Date

For use by the United Way of York Evaluation Committee:

Date Submitted: _____

- Completed Application
Statement of history, purpose, & goals
Report detailing last year's funds use
IRS 501(c)(3)
Special Campaigns Plan
Financial and Activity Statement
Statement of how funds will be used

Held interview with Organization representatives? Yes No Date
Request for additional information? Yes No Date
All information furnished by Partner 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 _____