Member Agency Application Form 2022

## Before filling out this form, please ensure that you have read the *2022 Member Agency Funding Guidelines*.

# Member Agency Information:

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| Agency Name: |  |
| Address: |  |
| Town/City: |  | Postal Code: |  |
| Phone: |  | Fax: |  |
| Website: |  |
| Executive Director: |  | Email: |  |
| Incorporated Charitable Registration Name: |  |
| CRA Charity Registration #: |  | Fiscal Year End: |  |
| # of Full-Time Staff: |  | # of Part-Time Staff: |  |
| How much liability insurance does your agency carry? |  |
| Is the agency supported by a sound financial plan for a positive future outlook? | ☐ yes ☐ no |
| If your organization has a surplus for dedicated reserves or operational reserves, please describe your policy with regard to amounts. Does your agency have any other surplus or deficit? If there is a surplus, how will it be used? If there is a deficit, how will it be cleared? |
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| What is the total number of clients your agency served in Haldimand and Norfolk in 2021? |  |
| Provide a brief overview of the agency and the work that it does: |
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| Please list the **name** and **position** of all members of the agency’s Board of Directors: | Please list the **name** and **position** of the top members of the agency’s senior staff: |
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| Describe how the agency collaborates with other agencies and organizations and how long you have had this collaboration: |
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| Describe the measures your agency takes to make sure it is fully accessible to the community: |
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# Involvement

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| Does the agency agree to display the United Way sign on the premises?  | ☐ yes ☐ no |
| Does the agency agree to provide a guest speaker at United Way events? | ☐ yes ☐ no |
| Does the agency agree to attend member agency umbrella meetings? | ☐ yes ☐ no |
| Does the agency agree to attend the United Way Annual General Meeting? | ☐ yes ☐ no |
| Does the agency agree to attend the Campaign kick off? | ☐ yes ☐ no |
| Does the agency agree to volunteer at special events when requested? | ☐ yes ☐ no |
| Does the agency agree to acknowledge funding from United Way of Haldimand and Norfolk during every community presentation/display? | ☐ yes ☐ no |
| Please check the following ways your agency is willing to use the United Way of Haldimand and Norfolk’s logo: |
| ☐ Letterhead☐ Brochure☐ Newsletter | ☐ Annual Report☐ Advertising☐ Web site  |
| What will the agency do to recognize/support United Way of Haldimand and Norfolk? |
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# Eligibility

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| For an agency to be considered for funding, all of the eligibility requirements must be met in the sole opinion of United Way of Haldimand and Norfolk. |
| 1. Is the agency a registered charity?
 | ☐ yes ☐ no |
| 1. Does the agency have a volunteer Board of Directors?
 | ☐ yes ☐ no |
| 1. Is the agency in receipt of a Notice of Breach of any existing contracts with United Way of Haldimand and Norfolk?
 | ☐ yes ☐ no |
| 1. Is the agency committed to comply with all Ontario Human Rights Legislation?
 | ☐ yes ☐ no |
| 1. Can the agency confirm that any funding received will not be used to duplicate existing funding, pay a pre-existing debt, or to pay for any liabilities incurred before any funding agreement has been signed?
 | ☐ yes ☐ no |
| 1. If the agency has received funding from United Way of Haldimand and Norfolk in the past, has the agency demonstrated a history of accountability in meeting terms and conditions of previous allocations?
 | ☐ yes ☐ no |
| 1. Has your agency attached the most recent audited financial statements?
 | ☐ yes ☐ no |
| 1. Has the agency attached the most recent annual report?
 | ☐ yes ☐ no |
| 1. Does the agency agree to submit future audited financial statements and annual reports during the life of this funding agreement if receiving multi-year funding?
 | ☐ yes ☐ no |
| 1. Has the agency demonstrated sound management and governance practices?
 | ☐ yes ☐ no |
| 1. Is the agency able to respond to community needs if and when they arise?
 | ☐ yes ☐ no |
| 1. Is the agency willing to complete mandatory reporting?
 | ☐ yes ☐ no |
| 1. Is the agency willing to share information for marketing purposes with United Way of Haldimand and Norfolk?
 | ☐ yes ☐ no |
| 1. Has the agency demonstrated effective use of resources (financial and human resources)?
 | ☐ yes ☐ no |
| 1. Does the agency agree to abide by the *Agency Fundraising Agreement* as written in the *2022 Member Agency Funding Guidelines*?
 | ☐ yes ☐ no |
| 1. Does the agency agree to abide by the Sub-License to use United Way of Haldimand and Norfolk marks as written in the *2022 Member Agency Funding Guidelines*?
 | ☐ yes ☐ no |

# Verification:

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| Can you verify that all of the information listed in the agency’s entire application is correct and true to your knowledge? | ☐ yes ☐ no |
| Name of Legal Signatory signing on behalf of the agency: |  |
| Title: |  | Date: |  |
| Signature: |  |