

Member Agency Application Form 2024

Before filling out this form, please ensure that you have read the *2024 Member Agency Funding Guidelines*.

Member Agency Information:

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?	<input type="checkbox"/> yes <input type="checkbox"/> 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?			
What is the total number of clients your agency served in Haldimand and Norfolk in 2023/24?			

<p>Provide a brief overview of the agency and the work that it does:</p>	
<p>Please list the name and position of all members of the agency's Board of Directors:</p>	<p>Please list the name and position of the top members of the agency's senior staff:</p>
<p>Describe how the agency collaborates with other agencies and organizations and how long you have had this collaboration:</p>	
<p>Describe the measures your agency takes to make sure it is fully accessible to the community:</p>	

Involvement

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

Eligibility

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?	<input type="checkbox"/> yes <input type="checkbox"/> no
2. Does the agency have a volunteer Board of Directors?	<input type="checkbox"/> yes <input type="checkbox"/> no
3. Is the agency in receipt of a Notice of Breach of any existing contracts with United Way of Haldimand and Norfolk?	<input type="checkbox"/> yes <input type="checkbox"/> no
4. Is the agency committed to comply with all Ontario Human Rights Legislation?	<input type="checkbox"/> yes <input type="checkbox"/> no
5. 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?	<input type="checkbox"/> yes <input type="checkbox"/> no
6. 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?	<input type="checkbox"/> yes <input type="checkbox"/> no
7. Has your agency attached the most recent audited financial statements?	<input type="checkbox"/> yes <input type="checkbox"/> no
8. Has the agency attached the most recent annual report?	<input type="checkbox"/> yes <input type="checkbox"/> no
9. 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?	<input type="checkbox"/> yes <input type="checkbox"/> no
10. Has the agency demonstrated sound management and governance practices?	<input type="checkbox"/> yes <input type="checkbox"/> no
11. Is the agency able to respond to community needs if and when they arise?	<input type="checkbox"/> yes <input type="checkbox"/> no
12. Is the agency willing to complete mandatory reporting?	<input type="checkbox"/> yes <input type="checkbox"/> no
13. Is the agency willing to share information for marketing purposes with United Way of Haldimand and Norfolk?	<input type="checkbox"/> yes <input type="checkbox"/> no
14. Has the agency demonstrated effective use of resources (financial and human resources)?	<input type="checkbox"/> yes <input type="checkbox"/> no

<p>15. Does the agency agree to abide by the <i>Agency Fundraising Agreement</i> as written in the <i>2023 Member Agency Funding Guidelines</i>?</p>	<p><input type="checkbox"/> yes <input type="checkbox"/> no</p>
<p>16. Does the agency agree to abide by the Sub-License to use United Way of Haldimand and Norfolk marks as written in the <i>2023 Member Agency Funding Guidelines</i>?</p>	<p><input type="checkbox"/> yes <input type="checkbox"/> no</p>

Verification:

<p>Can you verify that all of the information listed in the agency's entire application is correct and true to your knowledge?</p>		<p><input type="checkbox"/> yes <input type="checkbox"/> no</p>	
<p>Name of Legal Signatory signing on behalf of the agency:</p>			
<p>Title:</p>		<p>Date:</p>	
<p>Signature:</p>			