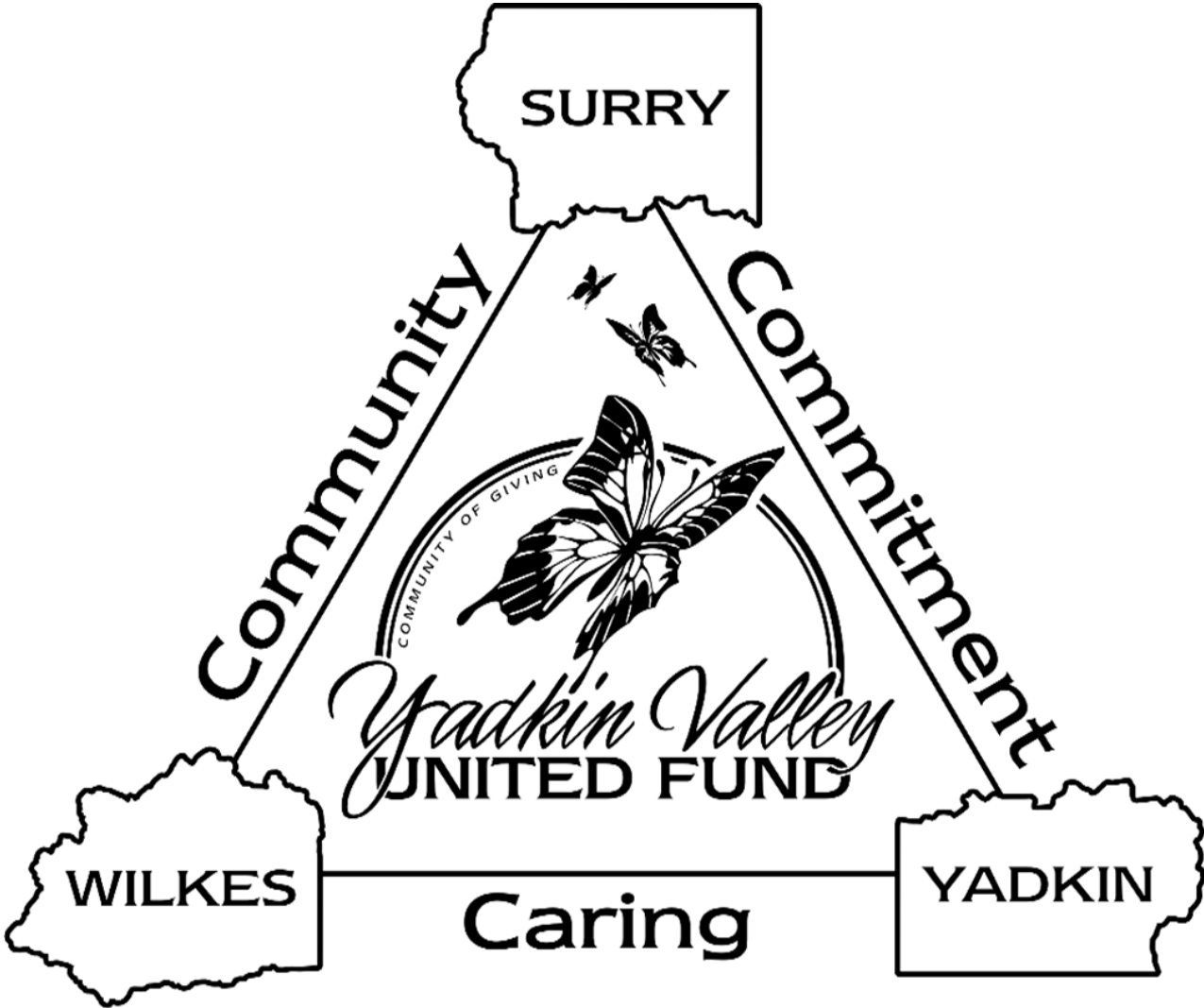


Yadkin Valley United Fund

Application for 2020

Funding/Participation



Thank you for your interest in the Yadkin Valley United Fund. We look forward to working with you over the next year. Enclosed you will find the application for funding to be distributed in 2020. Please complete all parts of the enclosed application and return the file via email to yadkinvalleyunitedfund@gmail.com by **April 16, 2019**. Paper copies of the application will not be accepted.

In addition to the application the following items will need to be submitted electronically. Please scan these files in and submit them as separate files. If your organization does not have the capabilities to submit the items listed electronically please contact the Yadkin Valley United Fund at the e-mail address listed above.

- List of Board of Directors
- Completed Agency/Budget Questionnaire
- Copy of current Annual Budget
- Copy of Annual Financial Statements or current balance sheet and profit/loss statement

New Applicants must include:

- Articles of Incorporation and By-Laws
- Current copy of 501 (c)(3)

The application agreement on page 12 will need to be printed, signed and mailed to the address provided below by April 16, 2019. Please be sure to read the agreement prior to submitting the signature page as there are new requirements of participating agencies. The signature page is the only paper item that will be submitted to Yadkin Valley United Fund for your current application.

PO Box 593
Elkin, NC 28621

(968 North Bridge St.)
(David Steelman, ED 336.469.2860)

If you are requesting \$5000+ or more you will be required to present your application to the Yadkin Valley United Fund Board of Directors in May. Yadkin Valley United Fund reserves the right to request any organization, regardless of monetary request, to present their application to the board on the dates listed above.

Please feel free to contact us at yadkinvalleyunitedfund@gmail.com if you have any questions regarding the requirements or instructions for submitting your application.

MEMBER AGENCY

APPLICATION TO PARTICIPATE/FUNDING

YADKIN VALLEY UNITED FUND, INC.

Date of Application

Agency Name

Executive Director

Mailing Address

Physical Address

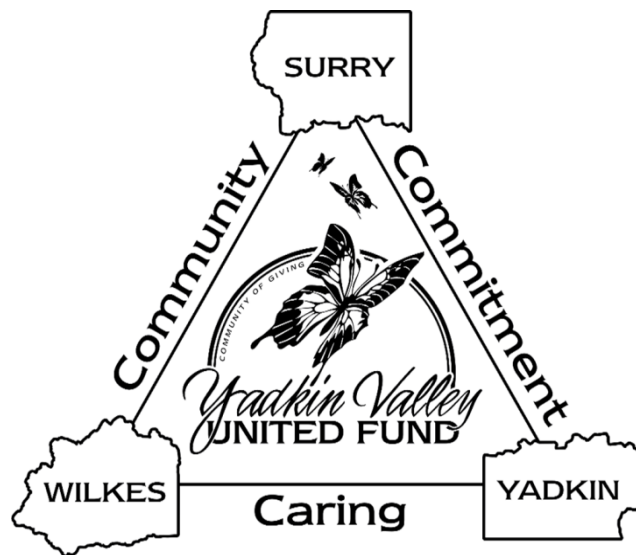
Hours of Operation

Telephone

Fax

E-Mail Address

Social Media



If you are a current agency give a brief overview of programs funded by YVUF and if you are a new applicant provide plans for funds from YVUF.

The above list provides the programs funded by the Yadkin Valley United Fund.

How is effectiveness measured of United Fund sponsored programs?

Participant surveys, participant feedback, evidence-based measuring tools, suggestion box and monitoring by the Area Agency on Aging.

Are you planning on adding programs or activities? Please include plan, cost and funding source.

Summarize your agency's accomplishments this past year.

Number of people in the Yadkin Valley United Fund service area served by your programs in the current year? (Please be prepared to provide records during agency presentation concerning this question)

Elkin	
Jonesville/Arl	
Mountain Park	
Ronda	
State Road	
Thurmond	
Traphill	

Total number of people served by your agency (include age groups if available)

Participants must be 50 and better, but we do not break this down into age groups.
Total number of people =

Agency Staff

Number of Full-time staff, Part-time staff, and Number of Volunteers:

Full-time:	Part-time:	Volunteers:

Please list staff members or insert/copy paste/ or scan an organizational chart for your agency.

Board Member participation: (number of members, how often do they meet and do they participate in fundraising for your organization)

Community Relations

In the past year, how did your agency identify itself as a Yadkin Valley United Fund agency? Please be specific (newspaper, social media, brochures, newsletters, etc.)

Please provide specific availability for current campaign (Photos, volunteers, presentation speaker and employee campaign if there are paid employees)

Financial Management

What is the agency's current operation budget?

What percentage of the total budget comes from Yadkin Valley United Fund?

What percentage of the total budget is spent on programs?

What percentage of the total budget is spent on staff and/or administration?

What is the agency doing to secure funds from sources other than the United Fund?

What is your greatest operations challenge and include any measures to reduce operating costs?

Do you charge clients for your services? If so, for what services and how much?

Please list your fundraising activities for the year, dates, income expectations, and actual results.

Fundraising Activity	Date	Income Expected	Actual Income

YADKIN VALLEY UNITED FUND, INC.
MEMBER AGENCY CRITERIA/AGREEMENT

Mission

To be the conduit which mobilizes the caring power of the community
for the betterment of the Yadkin Valley

To allow Yadkin Valley United Fund to maintain the goals of its mission, compliance in each of the following areas is required of each of our partner agencies.

- 1) Carry out the programs of the agency in such a manner as will best meet the needs of the community and will be consistent with standards of service, efficiency, and economy.
- 2) Conduct the programs and services for which Yadkin Valley United Fund has allocated funds.
- 3) The agency must identify itself as a partner agency and support the Yadkin Valley United Fund in every manner possible throughout the year. The United Fund logo should be displayed at the agency's facilities. The United Fund logo or statement of affiliation should be on letterhead, publicity, brochures, advertising, social media, informational pieces, news items, and other printed materials in order to inform the public that the agency receives United Fund support and to promote the United Fund Annual Giving Campaign.
- 4) Assist the United Fund with its annual campaign where practical and as requested involving the agency's board of directors, staff, and volunteers. The agency may be asked to participate in a speaker's bureau, provide success stories, and/or participate in United Fund events throughout the year. The United Fund will provide information on campaign activities and campaign materials as needed.

- 5) The United Fund annual campaign financially supports needed programs and services for the betterment of the communities in its service area. In order to cooperate with businesses, industry, and employee groups and to maximize support through a single annual campaign, the United Fund has a responsibility to define fund raising activities of member agencies.
 - a) Each agency is required to observe the “blackout period” during each year’s campaign. The blackout period for the each campaign is **Mid August through Mid November**.
 - b) The agency must obtain prior written approval from the United Fund regarding any supplemental fundraising activities other than those listed in the Agency Overview Questionnaire. When engaging in supplemental fundraising activities, the agency must protect the integrity of the United Fund’s annual campaign and in no way adversely affect the United Fund’s giving base. Agency fundraising activities may target the general public with a project that provides a service, product, or entertainment in exchange for a contribution.
 - c) A written report of fundraising efforts should be submitted with yearly budget information.
 - d) The agency must not solicit employee groups in the same manner as the United Fund campaign.
- 6) The member agency must respect the need of the United Fund to monitor agency fundraising efforts. Should an agency choose not to comply with the fundraising guidelines, the United Fund allocation may, at the discretion of the United Fund Board of Directors be reduced or terminated by an amount equal to the gross income of the non-complying fundraising event.
- 7) The member agency must submit a 100 word or less essay highlighting a person, or group, positively impacted by the use of Yadkin Valley United Funds. The essay, along with a picture, must be submitted via e-mail by April 16, 2019. This information may be shared in the Yadkin Valley United Fund’s newsletter and other publications.
- 8) Each agency may be ask to speak and/or be represented at YVUF functions.
- 9) Each agency will be required to supply Yadkin Valley United Fund with thank you notes to be distributed to individuals that designated donations to your organization.
- 10) The member agency is required to respond to any communication, including but not limited to e-mails and phone calls, from Yadkin Valley United Fund in a timely manner. All communication efforts and responses will be logged and addressed during your annual presentation.
- 11) An agency contemplating a solicitation for a capital campaign must include its plans in its United Fund allocation request.**

This agreement (2020 Funds Request) was read and approved by the financially participating agency. (Due to YVUF by 4-16-19)

Signature: _____

Printed Name: _____

Title: _____

Agency: _____

Date: _____

Mail to : YVUF PO Box 953 Elkin NC 28621

OR

Drop of at: YVUF Office, 968 North Bridge St. Elkin NC