



Agreement of Responsibilities

Between

United Way of Oxford & Lafayette County

And

(Insert Partner Agency Name)

Funding Period: July 1, 2017 – June 30, 2018

This agreement is based upon the mutual beliefs of both United Way and the Partner Agency that:

- The goal of improving lives for the people of Lafayette County demands the united efforts of all segments of the community;
- A community-wide fundraising approach; collaborative planning to meet the community's educational, health, and human service needs; and the awarding of funds based upon citizen review of programs are the most effective and efficient ways to improve lives in the community;
- A clear understanding and mutual acceptance of the respective roles of United Way and each Partner Agency is essential to their joint effort to improve lives by meeting the educational, health, and human service needs of the community and work together to meet these needs.

Section I: Annual Fundraising Campaign

United Way agrees to:

- a) Conduct an annual community-wide fundraising campaign and perform all collection duties of the pledges received during the campaign;
- b) Distribute any designated dollars as part of the quarterly payment of awarded funds.

The Partner Agency agrees to:

- a) Cooperate with United Way in conducting the most effective campaign possible by providing help when requested. This includes, but is not limited to, providing campaign volunteers, public relations support, and attending campaign functions;
- b) Not solicit local employee groups at any time;
- c) Not conduct campaigns to encourage designations.

Section II: Grant Awards

United Way agrees:

- a) To be advised by community members in awarding contributed funds.

The Partner Agency agrees:

- a) To accept the final award approved by United Way's Board of Directors and use it for operating or equipment expenses only. Bricks and mortar expenses are not allowable expenses.

Section III: Public Relations

United Way agrees:

- a) To generate community support for United Way and its Partner Agencies (in addition to annual campaign activities) through year-round marketing and public relations efforts;
- b) To publish and distribute throughout Lafayette County information that indicates (at a minimum) the name, address, and telephone number of all United Way Partner Agencies.

The Partner Agency agrees:

- a) To mention United Way affiliation in publications, press releases, flyers, presentations, etc., and use the United Way logo on printed material where appropriate;
- b) To comply in a timely manner with all United Way requests for agency-related articles, photos, narratives, and other reasonable public relations information which, in turn, allows United Way to meet its obligation stated above.

Section IV: Administration

United Way agrees:

- a) To respect the Partner Agency's autonomy and right to determine its own policies and programs;
- b) To provide at the beginning of each year a tentative calendar for the upcoming year as well as a tentative list of the items the Partner Agency is required to submit to United Way throughout the year;
- c) To foster a cooperative atmosphere for service delivery by collaborating with Partner Agencies and other agencies when planning ways to serve targeted areas or populations;
- d) To ensure fairness in the treatment of Partner Agencies by monitoring each Partner Agency for compliance with this agreement.

The Partner Agency agrees:

- a) To have an active local volunteer board which ensures effective management and meets at least quarterly (unless otherwise agreed upon between United Way and the Partner Agency), and to make the minutes of those meetings available to authorized United Way volunteers;
- b) To collaborate with other agencies in the development and delivery of services to the community and, when appropriate, work to eliminate unnecessary duplication of such services;

- c) To submit audited financial statements or an otherwise agreed upon set of financial statements that include at a minimum, a compiled balance sheet as well as a profit and loss statement for the most recently completed fiscal year;
- d) To comply with all applicable legal, federal, state, and local operating and reporting requirements (e.g., generally accepted accounting practices, annual audit, Form 990 or Form 990Z, and non-discrimination);
- e) To submit complete and accurate reports mid-way through the funding period (by the last day of January) and at the end of the funding period (by the last day of July);
- f) To inform United Way of any significant procedural, administrative, managerial, program-related, or financial changes that are expected to occur (or have occurred) since submission of the last report;
- g) To comply with the spirit and intent of the United States of America Patriot Act and other counterterrorism laws and to submit certification to United Way indicating such as part of the funding request process;
- h) To comply with all other United Way policies not specifically stated herein.

Section V: Noncompliance

Noncompliance with this agreement will be:

- a) Reviewed by United Way on a quarterly basis and could result in funds being withheld in subsequent quarters;
- b) Taken into consideration when determining future funding awards.

This agreement shall be reviewed and approved annually by United Way and the Partner Agency.

This agreement has been read, approved and signed by:

Partner Agency: _____

Partner Agency Executive Director: _____

Signature: _____ Date: _____

Partner Agency President of Board of Directors: _____

Signature: _____ Date: _____

This agreement has been read and approved by United Way of Oxford & Lafayette County.

UWOLC Executive Director: _____

Signature: _____ Date: _____