



MEMORANDUM OF UNDERSTANDING

It is essential to the health and welfare of our community that we create a system of strong and effective voluntary agencies that provide programs that impact upon the human care needs of our county.

To assist these voluntary agencies we must be committed to a strong community supported United Way that can identify and prioritize human care needs, raise human, monetary and material resources, and invest those resources to effectively and efficiently impact upon those priority needs.

The United Way of Bay County and its Community Impact Partners have long enjoyed the benefits of a mutually supported relationship, the cornerstone of which is trust and support for each other and the principles for which each stands.

In that regard, the United Way of Bay County and Partner Agencies pledge their support to the following:

- I. BOTH THE UNITED WAY AND THE AGENCY AGREE:
 - A. To maintain a responsible governing board which meets regularly during the year to carry out the mission and purposes of the organization.
 - B. To keep each other informed on all matters of common concern and to consult together when problems or misunderstandings arise.
 - C. To operate by policy and practice without discrimination based upon Federal or State law.
 - D. To meet all State and United States Treasury Department Internal Revenue Service requirements as a not-for-profit agency.

- II. UNITED WAY AGREES:
 - I. To recognize the responsibility of the Agency's Board to determine its own policies and to manage its own program within the scope and spirit of this agreement.
 - II. To provide adequate program and budget review by responsible committees of citizens to assure programs and expenditures of funds provide impact upon community human care needs.
 - III. To set campaign goals with due regard for the financial needs of the participating agencies, the economic climate, the community's fund raising potential and the long range welfare of the United Way which is important to both the agencies and the contributors.
 - IV. To conduct an annual campaign for funds, year round volunteer recruitment programs and other activities to raise the greatest amount of resources to be responsive to community needs.
 - V. To be a responsible steward of funds publicly contributed to the United Way by fully informing contributors on the use of those funds and by submitting all records to an annual audit by an independent auditor.
 - VI. To promote the accomplishments of the Agency whenever possible and appropriate.
 - VII. To pay the Agency monthly after its investment amount is determined.

III. THE AGENCY AGREES:

- A. To coordinate with and give full support to the United Way and to the annual campaign by making volunteer and professional leadership available and by rendering such other services as will tend to assure the success of the campaign.
- B. To submit within designated time lines program and budget materials including a concise statement of agency measurable outcomes that impact on priority needs.
- C. To accept the allocation of funds made to it for the current year and to operate within the United Way grant regarding the use of the funds. Once allocations are determined for specific programs, the agency may not transfer any portion of the allocation from one program to another without agreement with the United Way.
- D. To provide the United Way with audits prepared by a certified public accountant, financial reports, service figures and other information such as-Internal Revenue Service form 990 and comply with GAAP Standards.
- E. To acknowledge the contribution of United Way on all electronic and print materials that promotes any programs receiving financial support from United Way of Bay County by utilizing the UWBC logo or in text: "This program is funded with support from the United Way of Bay County".
- F. To collaborate with other organizations both private and public in meeting the needs of the community to prevent duplication of services and to promote high standards of efficiency and effectiveness.
- G. To submit a six, twelve, eighteen month and final report to United Way on outputs and outcomes for each program that receives funding from United Way.
- H. To contact United Way in the event that the agency experiences a significant change in overall financial status or operational status of any United Way funded programs and services.

IV. FUNDRAISING POLICIES

The fundraising guidelines below are intended to avoid competition and to achieve a strong community wide corporate, employee and individual United Way campaign commitment as well as provide opportunities for Partner Agencies to meet their financial needs.

- A. Partner agencies support the efforts of the United Way to obtain corporate and individual gifts by refraining from conducting public fundraising activities from **September 1 – November 15** of each calendar year. Outside this restrictive timeframe, agencies can seek corporate gifts for:
 - In-kind contributions
 - Funding for special programs
 - Capital campaigns
 - Special events
 - Disaster appeals
- B. Partner agencies agree to support the efforts of the United Way to solicit employees for payroll contribution by not seeking to conduct their own employee payroll deduction fund drives.
- C. Agencies are asked to inform and consult with the United Way regarding major public fundraising events for clarification and to avoid conflicts.

This Agreement has been read and approved at the meeting of the governing body of the Agency on _____ (date).

Agency Name: _____

By: _____ (President or Chair)

By: _____ (Executive Director)

Date: _____

Agency Name: United Way of Bay County

By: _____ (President or Chair)

By: _____ (Executive Director)

Date: _____