



**UNITED WAY – FUNDED PARTNER AGENCY AGREEMENT**  
*(One signed copy shall be returned to United Way and one kept by the Agency)*

AGENCY \_\_\_\_\_

COLLABORATION, if Fiscal Agent for Collaboration \_\_\_\_\_

FUNDING TYPE	FUNDING PERIOD	FUNDING AMOUNT
Annual Sustained-Funding - <b>Education</b>		
Annual Sustained-Funding - <b>Income</b>		
Annual Sustained-Funding - <b>Health</b>		

**Mission of the United Way of Washington County:** Mobilize the caring power of Washington County to improve lives and community conditions in measurable and lasting ways.

*This document is to be signed on a calendar year basis by any not-for-profit that receives United Way of Washington County (United Way) funding for program services in Washington County, or as the fiscal agent of a collaborative that provides program services in the county.*

*The Funded Partner Agency understands that this Agreement is a statement of intent to fund, but does not constitute a funding commitment by the United Way. Because funds to be distributed by United Way to this Agency are taken from designation of unrestricted funds for service allocations, United Way is not able to guarantee funding at any time. United Way reserves the right to restrict, limit, or terminate funding.*

**United Way will assume the following responsibilities:**

1. Work with a cross-section of the community, government and agencies to identify problems and address solutions so that community needs are met in an effective and efficient manner.
2. Establish goals for and conduct an annual campaign in the workplace and the community to raise the optimum amount of funds for United Way Funded Partner Agency programs.
3. Promote good stewardship of United Way resources, including donations, grants and other contributions that are used to pay for community program services, fundraising expenses and operating expenses by:
  - a. Fully informing contributors about the use of funds
  - b. Honoring all donor designations
  - c. Submitting all appropriate records for an annual audit by an independent auditor
  - d. Assisting, or reviewing Funded Partner Agency program(s) when appropriate
4. Establish criteria for allocating funds or denying requests to agency programs based on an assessment of the community's needs, local priorities, program performance, and available funding.
5. Invest approved funds in programs that provide services to residents of Washington County. Conduct periodic comprehensive volunteer panel reviews to assure accountability and effectiveness utilizing program funding and program outcome measurements. Investment level is subject to the dollars raised and collected.
6. Promote a positive relationship among Funded Partner Agencies and the public through a year-round communication program that informs the public about the impact United Way funding has on essential services.

7. Inform an agency if any required application documentation is missing.
8. Pay the Funded Partner Agency quarterly after its allocation has been determined, unless the conditions of this agreement are not followed or funding has been suspended due to the Agency being placed on probation.

**United Way and Agencies receiving funding from United Way will both assume the following responsibilities:**

1. **Non-Profit Status:** Maintain Agency status as a non-profit charitable organization and conduct its operation in a manner which will not jeopardize the tax deductibility under state and federal law, and the exemption under federal, estate, and gift tax laws.
2. **Governance:** Be governed by a Board of Directors that meets at least four times annually. Board members shall not be compensated for their services.
3. **Protection of Public Funds:** Protect public funds by maintaining sound financial operations on a defined budget basis and maintain a sound system of accounts covering income.
4. **Collaboration:** Seek appropriate opportunities to collaborate with other agencies, both public and private, in an effort to address community issues in the most effective and efficient manner.

**Agencies receiving funding from United Way will assume all the following responsibilities. Failure to comply may result in a reduction of up to 5% in program funding for the next calendar year:**

1. **United Way Funds:** Assure funds are used to achieve desired results as outlined in the program application.
2. **Support United Way Campaign:**
  - Financially support the United Way campaign through an employee campaign, organizational donation, and/or special fundraising event.
  - Attend all United Way campaign events
  - Participate in the United Way of Washington County Speakers Bureau
3. **Restricted Activities:** An agency may solicit its own employees but may not ask employees or volunteers to solicit any other employee groups at any other workplace at any time. Solicitation of designations is also unacceptable at any time.
4. **2-1-1:** Provide and maintain agency program and contact information to IMPACT 2-1-1.  
*NOTE: IMPACT 2-1-1 is the phone and online service provider for information and referrals for Washington County*
5. **Branding:** Display United Way identity signs and logo as widely as possible, including on letterhead, newsletters, brochures, website and multi-media projects, and at your physical offices. In addition, the organization must identify itself as a United Way “Funded Partner Agency” in communications with the media. Partner Agencies are asked to make every effort to recognize United Way funding in media releases and at public events, particularly when referring to a United Way funded program.
6. **Request for Funding:** Submit an application for funding as required by United Way. Provide all required documentation. Only applications with all required documents will be considered to receive program funding. Comply with all of United Way’s Community Investment procedures.
7. **Reporting Requirements:** Prepare and submit requested financial and program reports resulting from the delivery of funded services on a schedule defined by United Way.  
*NOTE: Although a Year-End Report will be required for most programs, more frequent reporting may be requested for programs/collaborations that receive Focus-Initiative Funding and/or other reason as determined by United Way*

8. **Financial Audit / Financial Review:** Submit an annual **Financial Audit** from a Certified Public Accountant (CPA) who is not affiliated with your Agency following the end of your fiscal year.  
*NOTE: As part of a funding application, those agencies with less than \$600,000 in REVENUES in a fiscal year may submit a **Financial Review** from a Certified Public Accountant (CPA) who is not affiliated with your agency in place of a Financial Audit. Copy of the most recent **990** may be submitted during years no application is required (United Way reserves the right to request Profit & Loss and Balance Statements).*
9. **Return of Funds:** Any funds not used during the defined program year should be returned to United Way within 45 days.
10. **Meeting & Event Attendance:** Funded Partner Agencies will have at least one representative (staff or volunteer) at the United Way Funded Partner Agency Meetings.
11. **Agency Independence:** This Agency expressly represents and warrants to United Way that it is not and shall not be construed to be an employee of United Way and that it is solely responsible for its actions and inactions in performing this Agreement and for filing all necessary forms and returns and for making all required payments with the relevant taxing authorities.
12. **Indemnify & Hold Harmless:** This Agency will indemnify and hold harmless United Way, its officers, directors, employees, and representatives from any and all claims, losses, liabilities, damages, expenses, causes of action and costs (including attorneys' fees and court costs) incurred by or brought against United Way caused by or which in any way results from any breach by the Agency of its prevailing standards of care under this Agreement, or as a result of any other act or omission of the Partner/s in connection with this agreement.
13. **Anti-Terrorism Compliance Measures Certification:** In compliance with the USA PATRIOT ACT and other counter-terrorism laws, United Way requires that each agency certify the following:

United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statues and executive orders.”

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Failure to comply with one or more of the above may result in United Way withholding quarterly checks or terminating this agreement.

**We have read and understand the Agreement and will comply with the terms stated.**

\_\_\_\_\_  
United Way Executive Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
United Way Board President

\_\_\_\_\_  
Date

\_\_\_\_\_  
Agency Exec. Director/Fiscal Agent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Agency/Fiscal Agent Governing Board Chair

\_\_\_\_\_  
Date