

STANDARD AGREEMENT

between

United Way of the Greater Clarksville Region

and

(Official Agency Name)

(Agency Mailing Address)

This agreement is entered into with the mutual beliefs of the above named parties who recognize that:

- (a) the participation of representative citizens in community-wide planning, allocations, communications and fundraising for local agencies is essential;
- (b) a combined fundraising approach is the most effective way to provide for the financial need of agencies; and,
- (c) consideration of the total needs of the community in the establishment, continued maintenance, and improvement of effective and necessary human services forms the basis for this working relationship.

IN FURTHERANCE OF THESE MUTUAL BELIEFS:

BOTH UNITED WAY AND THE AGENCY (having been determined incorporated, not-for-profit, and tax exempt and having a 501(c)(3) status) **AGREE:**

1. To maintain an active, rotating structure, composed of local volunteers, which assumes and fulfills the responsibility of managing its affairs within the scope and spirit of respective bylaws and this agreement;
2. To provide needed services on a nondiscriminatory basis to the citizens of the area served by United Way of the Greater Clarksville Region;
3. To strive to increase the public's understanding and appreciation of and participation in human services programs; and,
4. To consult and work together on matters of common interest in an effort to achieve the best interest of the community as a whole.

B. THE AGENCY AGREES:

1. To support and assist in the United Way annual fundraising campaign in all appropriate ways; (Kick-off, speaking opportunities, Campaign Celebration event & workplace campaign)
2. To engage in an effective public relations program in which the objectives, services, and accomplishments of the Agency and the United Way support of such services are adequately publicized; to cooperate with and assist the United Way by placing the United Way logo on letterhead, publications and the like; at the facility occupied by the agency, and at all of its public functions;

3. To submit its proposed budget request each year to the United Way and to cooperate with the Budget & Allocations Committee in accordance with its review procedures;
4. To prepare and adopt a balanced budget based upon the available funds from the United Way and other sources; and to conduct its operation in accordance with its budget.
5. To keep accurate and complete records of financial and program information and submit them to the United Way as requested;
6. To obtain annually (a) an independent certified audit of its financial affairs if the Agency's budget exceeds \$250,000*; (b) a review by a CPA firm if the Agency's budget is between \$50,000 and \$250,000; or (c) compiled financial statements if the Agency's budget is less than \$50,000; and to submit a copy of said audit, review or compiled financial statements to United Way upon receipt of the document by the Agency.
7. To carry out the programs of the Agency in such a manner as will best meet the needs of the community and be consistent with standards of service, efficiency and economy;
8. To cooperate with other Agencies and coordinate services to meet the needs of the community without duplication;
9. To submit for prior approval all proposals for programs and/or staff expansion that require United Way financial support now or in the future;
10. To submit for prior approval all proposals for independent fund raising efforts (both capital and supplementary operating funds), including program goals, procedures and dates, and to comply with United Way's *Criteria for Outside Fundraising*;
11. To notify UWGCR of any successful legal judgments against the agency;
12. To attend all agency meetings as called by the UWGCR and;
13. To have on file at the United Way office:
 - a. a list of current Board Members with home and business phone numbers and addresses
 - b. a copy of most recent annual report
 - c. a copy of the most recent IRS Form 990. If the IRS does not require the agency to file Form 990, the agency must still complete one to be eligible for United Way funding.
 - d. a copy of the most recent audited, reviewed or compiled financial statements.
 - e. a copy of the agency's Bylaws and Articles of Incorporation
 - f. a copy of the IRS letter stating the agency's 501(c)(3) status
14. To participate as needed in a Community Needs Assessment conducted by United Way of the Greater Clarksville Region in partnership with Austin Peay State University.

UNITED WAY GCR AGREES:

1. To respect the agency's decision of determining its own policies and programs within the communities served
2. To develop its recommendations for the campaign objectives for the annual fundraising campaign with due regard for the requirements of all participating agencies, fundraising realities and other pertinent considerations to raise the maximum of funds
3. To use its best efforts to achieve the campaign objectives
4. To provide a reasonable and comprehensive volunteer review for the Agency
5. To act as a responsible steward of funds publicly contributed to the United Way by fully informing the agencies of their allocations and designations
6. To submit all of its financial records to an audit by an independent public accountant. (Audit is located on the website www.liveunitedclarksville.org)
7. To distribute the results of the Community Needs Assessment upon completion

This contract shall be ongoing and may be revoked by either party giving notice to the other party 90 days before its desire to terminate this agreement. Any Agency where rights are terminated in such a manner shall have the right to a hearing before the United Way Board of Directors to request a reconsideration of the termination.

This agreement has been read and approved at the meeting of the governing body of this agency held on _____ and at a meeting of the United Way governing board.

UNITED WAY AGENCY _____

AGENCY

UNITED WAY

Signed _____
Chief Volunteer Officer

Signed _____
Chief Volunteer Officer

Chief Executive Officer

Chief Executive Officer

Date

Date

CRITERIA FOR OUTSIDE FUNDRAISING

by the United Way of the Greater Clarksville Region Partner Agencies

1. There will be no outside fundraising by partner agencies between September 1 and October 31 of each year. This includes direct mail or invitations as well as soliciting any donor who gives to United Way whether corporate, retail or individual donor.
2. Understanding that United Way of the Greater Clarksville Region utilizes workplace solicitation as its primary source for obtaining campaign revenue, including corporate contributions and employee payroll deductions, and campaign volunteer or mail solicitation of professionals and self-employed individuals, partner agencies will not conduct nor participate in any form of an organized, formal, workplace campaign/solicitation at any time.
3. If events MUST fall within UW blackout period, requests for special events, etc. must be approved at least 30 days prior to the event and will only be considered at regular United Way meetings of the Executive Committee or Board.
4. Requests for new fund drives, special events, etc. must be approved at least one month prior to the event and will only be considered at regular United Way meetings of the Executive Committee or board. Annual fundraising events do not have to receive approval annually after the initial approval.
5. Any monies raised by agencies in violation of these rules will be deducted from the agency's United Way allocation.

As recipients of UW funds, partner agencies are expected during the annual UWGCR campaign to:

- **Provide volunteers for campaign projects** and activities such as kickoff press conference, workplace presentations, campaign celebration event, and any other opportunities to increase awareness of agency programs and services.
- **Communicate partnership with UWGCR** via the use of the United Way logo on agency materials and by posting the logo and campaign materials on agency property.
- **Conduct in-house United Way campaigns for board, staff and clients**. This can be accomplished through payroll deductions, one-time giving, or anonymous donations, such as in a "giving jar."

This policy was reviewed and adopted by _____, a United Way partner agency, at the _____ Board of Directors meeting. (date)

Chief Executive Officer

Date

Chief Volunteer Officer

Date

Please retain a copy of your signed statement and return the original to the United Way office.

Anti-Terrorism Compliance Measures

In compliance with the USA PATRIOT Act and other counterterrorism laws, the United Way of the Greater Clarksville Region requires that each agency certify the following:

"I hereby certify on behalf of _____ (*name of grantee*) that all United Way funds and donations will be used in compliance with all applicable anti-terrorism financing and asset control laws, statutes and executive orders."

Print Name: _____

Title: _____

Signature: _____

Date: _____