



**STATEMENT OF AGREEMENT Between  
UNITED WAY OF BARTOW COUNTY and  
AGENCY NAME:**

Please initial each section and sign the last page to signify that you have read and understand the terms of this agreement.

This statement of agreement must be submitted to the United Way of Bartow County (UWBC) prior to a new funding year. It is an integral part of the agency application for funds from the United Way. The signing of this agreement will allow the release of any allocated funds for the following year should the agency be selected as a United Way Member Agency. This agreement lists the terms of common agreement between the United Way of Bartow County and the Member Agency during the period of time that the Agency is funded by the United Way.

The United Way's relationship with agencies is one of mutual support. This relationship revolves around four primary areas. They are: (1) Fundraising and allocating funds through an equitable and effective volunteer review process (2) Communicating agency services to the public (3) Planning for the needs of the total community (4) Administration and management.

It is the objective of the United Way of Bartow County and the United Way Member Agencies that the optimal amount of money be made available for the provision of human services in Bartow County.

United Way's role in helping raise these funds is based upon the concept of a single annual campaign that elicits a response from the entire community, raising more money in a more efficient manner than would be likely with multiple, competitive fund-raising campaigns.

The United Way of Bartow County and the Member Agency agree to work cooperatively to increase the public's awareness and understanding of the human service needs of the area and to work together to meet these needs. Based upon this premise, this agreement is entered with a spirit of mutual confidence, understanding and trust.



## **SECTION I : MUTUAL AGREEMENT**

\_\_\_\_ Section I. Both United Way and the Member Agency agree:

Initials

A. That the goal of meeting the human care needs of the people of Bartow County requires the united efforts of all segments of the community.

B. That human service planning, community-wide fundraising, and the allocation of funds based upon citizen review of services are the most effective and efficient means of meeting the human needs of the community.

C. That clear understanding and mutual acceptance of the respective roles of the United Way and the Member Agency is essential to our joint effort to meet the human needs of Bartow County.

D. To promote cooperation among all nonprofit agencies and initiatives in Bartow County in an effort to reduce duplication of services and increase resources available to meet human service needs.

E. To make their Boards and staff available to participate in community planning efforts to facilitate coordination of the programs of all Member Agencies and the United Way.

F. To keep each other informed on matters of common concern and to consult each other regarding problems or misunderstanding in an effort to identify solutions that are in the best interest of the residents of Bartow County.

G. To promote effective service, efficient administration and comply with all Generally Accepted Accounting Principles (GAAP).

H. To refrain from knowingly breaking laws or encouraging others to do so.

## **SECTION II: UNITED WAY AGREEMENT**

\_\_\_\_ Section II. The United Way agrees:

Initials

A. To conduct an annual community-wide fundraising campaign and perform all collection duties of the pledges received during the campaign.

B. To allocate contributed funds through the volunteer review process.



- C. To set the total annual campaign goal based on Agency needs, community needs and the prevailing economic conditions.
- D. To recognize the right of the Agency to determine its programs and services, its policies of operation, and to administer its own internal affairs.
- E. To annually implement a community-wide marketing and communications program that promotes the services of United Way Member Agencies.
- F. To provide, upon request and within available resources, consultation and assistance to the Agency in such areas as management, finance, marketing and public relations, and program and evaluation.
- G. To pay the Member Agency on a monthly basis by the 30th of each month beginning in February 2025.
- H. To maintain responsible stewardship on behalf of United Way donors and Member Agencies.
- I. To respect the confidential nature of information provided by the Agency.
- J. To provide a wide variety of supportive services aimed at increasing the capacity of the social service system to respond to community needs. These services include but are not limited to: information and referral, advocacy, community initiatives, collaboration building, grant making, volunteer program consultation and support, and research and planning around human service needs.

**SECTION III: MEMBER AGENCY AGREEMENT**

\_\_\_\_ Section III. The Member Agency agrees:

Initials

- A. To cooperate fully in the annual fundraising effort and will encourage the participation of its constituency in such activities. The Agency will conduct an annual United Way campaign among its employees and Board of Directors.
- B. Having met United Way Certification Standards at the time of admission, to operate within the framework of the United Way's guidelines, policies and procedures.
- C. To refrain from mailed or emailed solicitations during the United Way campaign dates of August 15 through October 31. Fundraising events are not encouraged during this time; however, if member agencies deem them to be necessary, agencies are required



to notify United Way of Bartow County of intent to host a fundraising activity and to inquire about corporate sponsors hosting United Way campaigns during the same time periods so United Way corporate partners are not approached regarding donations to the agency's event.

D. To keep the United Way informed of agency information (newsletters) and special activities throughout the year so that the United Way has an opportunity to support such activities.

E. United Way of Bartow County will provide suggested social media posts, including sample verbiage, frames, and formatting, which can be edited, as well as hashtags specific to UWBC that should be included alongside an image with social media posts. Partner will create at least one post announcing this Agreement on a social media channel of its choosing. UWBC will promote said post announcing the investment in Partner's program.

F. Partner will add the United Way of Bartow County seal to its website, either on the home page, a page dedicated to the funded program, or another appropriate location.

G. To take steps deemed necessary to avoid conflicts of interest in its appointments and actions to avoid public censure of the Agency or of the United Way.

H. To have this agreement reviewed and renewed annually by the Member Agency's Board of Directors, so that all members are fully acquainted with its terms.

I. To certify that United Way funds and donations will be used in compliance with all applicable anti-terrorism financing and asset control laws, statutes and executive orders.

J. That all communications between United Way and the agency will be conducted through the Director of the agency, as indicated on the agency funding application.

K. To complete monthly reports about program success and submit required documentation and grant reports by established deadlines which are:

Mid-Year Report: June 30, 2025

Year-End Report: December 31, 2025

Member Agencies are responsible for the submission of these reports by the dates listed above or upon request of United Way of Bartow County.

Failure to submit reports may result in the suspension of funding.



M. Acceptance of funding will require your agency to meet with the United Way Board of Directors upon request.

#### **SECTION IV: COMPLIANCE**

\_\_\_\_ Section IV. Changes to compliance with and termination of this agreement:

Initials

A. If, at any time during the life of this agreement, it becomes necessary to change the terms of the agreement, such changes, after being mutually agreed upon by and between the Member Agency and the United Way, shall be effective when incorporated in written amendments to the agreement.

B. The United Way reserves the right, at any time during the term of this agreement, to reduce or withhold the Agency's funding, place the Agency on probationary status, or terminate this agreement if any of the following conditions occur:

1. Failure on the part of the Agency to adhere to the standards or policies set forth and covered by this agreement.
2. Failure on the part of the Agency to deliver agreed upon services.
3. Failure on the part of the Agency to operate within United Way Certification Standards.
4. Failure on the part of the Agency to submit required documentation and grant reports by established deadlines.
5. Significant changes in conditions (revenue, facilities, staffing, client base, etc.) that result in the Agency's inability to effectively operate the program(s).
6. Actions on the part of the Agency which are harmful to the interests of the United Way.

The United Way will first notify the Agency of the specific problems and will give the Agency an opportunity to meet with the United Way in an effort to identify solutions that are in the best interest of the residents of Bartow County.

C. In the event of unforeseen circumstances related to the availability of funds, the United Way reserves the right to adjust allocations upon thirty (30) days written notice to agencies.



IN WITNESS WHEREOF, this ANNUAL AGENCY AGREEMENT for the year of 2025 has been duly executed in duplicate, the original by the proper officer of the United Way of Bartow County, and the Member Agency, effective on this date:

**UNITED WAY OF BARTOW COUNTY**

*Jennifer Williams*  
\_\_\_\_\_

Signature

Jennifer Williams, Executive Director

\_\_\_\_\_

Date

**MEMBER AGENCY**

\_\_\_\_\_

Agency Name

\_\_\_\_\_

Executive Director (Print Name)

\_\_\_\_\_

Executive Director (Signature)

\_\_\_\_\_

Chair, Board of Directors (Print Name)

\_\_\_\_\_

Chair, Board of Directors (Signature)

\_\_\_\_\_

Date

REFERENCE PURPOSES ONLY