



## 2019 PARTNER AGENCY AGREEMENT

### United Way of the Lakeshore Agrees:

1. That the Partner Agency's Board of Directors has the responsibility to determine Agency policies, budgets, and programs;
2. To promote the identity of the Partner Agency to the community;
3. To assist the Agency in educating the community about the Agency's operations and programs.

### Partner Agency Agrees:

Your Agency Name \_\_\_\_\_

1. To accept the terms of this agreement by formal action of its Board of Directors.  
Date: \_\_\_\_\_
2. To abide by the policies of United Way of the Lakeshore, as detailed in the Fund Distribution Policy and Procedures Manual.
3. To use funds received from United Way of the Lakeshore solely for the purpose described in the Partner Agency's application. No change in the purpose of the award may be made without prior written approval from United Way of the Lakeshore. Partner Agency will notify United Way of the Lakeshore of changes in key staff or board composition.
4. To provide, by the last Friday in January, a financial report and an evaluation of the outcomes of the program(s) receiving funding.
5. To provide, as soon as they are available, a copy of the organization's annual audit and the Internal Revenue Service Form 990.
6. To keep and maintain records of expenditures adequate to confirm the use of the award.
7. To support the United Way effort throughout the year, including identification as a United Way Partner Agency in all publicity regarding the awarding of these funds or the program supported by this award.
8. To focus Agency resources on assisting United Way during the annual campaign, September 1 through November 15, **including running an internal campaign with their staff.**
9. To not use these funds to attempt to influence legislation of any governmental body, other than that which occurs when non-partisan analysis, study, and research are made available.
10. To report immediately to United Way of the Lakeshore of any change in tax-exempt status or changes in the organization that could lead to a change in that status.
11. To utilize local vendors/contractors when it is cost effective, and to look for opportunities to collaborate and cooperate for cost savings and program effectiveness.

### United Way of the Lakeshore and Partner Agency Mutually Agree:

1. To be accountable to the community for their expenditures and accomplishments;

- 2. To keep each other informed of matters of common concern and to maintain regular, open channels of communication;
- 3. To consult and work together for the resolution of mutual problems;
- 4. To work with each other as well as other agencies, groups, and organizations, whether public or private, and interested individuals in the community at large and to program efforts so as to better meet the needs of this community, prevent unnecessary duplication of services, ensure high standards of performance and the delivery of high quality service.

This agreement will be in effect from the date it is signed by both parties until such time as it is terminated by either party, with ninety (90) days written notice.

**Partner Agency:**

**United Way of the Lakeshore:**

\_\_\_\_\_  
*Staff Member Signature*

\_\_\_\_\_  
*Staff Member Signature*

\_\_\_\_\_  
*Staff Member Title*

\_\_\_\_\_  
*Staff Member Title*

\_\_\_\_\_  
*Board Member Signature*

\_\_\_\_\_  
*Board Member Signature*

\_\_\_\_\_  
*Board Member Title*

\_\_\_\_\_  
*Board Member Title*

\_\_\_\_\_  
*Agency*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*

For questions, please contact Wyneice Hairston, Community Impact Manager at (231) 332-4017 or [wyneice@unitedwaylakeshore.org](mailto:wyneice@unitedwaylakeshore.org)