



UNITED WAY OF NORTH CENTRAL OKLAHOMA PARTNER AGENCY AGREEMENT 2023

AGENCY RESPONSIBILITIES

All agencies are required to submit a newly signed and dated Agency Agreement each year. The Agency Agreement is presented here:

AGENCY AGREEMENT

1. Agencies must maintain active and necessary programs. The objectives of the program must be pursued with careful regard to the welfare of the public and persons served by the program.
2. The agency must demonstrate and present evidence of:
 - a) a clearly defined program
 - b) an organization and procedure adequate to carry out the program
 - c) qualified staff and facilities appropriate to the purpose and numbers served
 - d) hours of service that conform to functional practice and geared to meet the needs of the population served
 - e) basic records and statistics which clearly reflect the agency's work
 - f) service that cannot be adequately carried on by an already existing United Way funded agency
 - g) outcome based organization
3. The agency must exhibit a cooperative working relationship in community planning with other United Way partner agencies as well as non-members also engaged in social service activity to insure that services are not duplicated and to help strengthen present or proposed services.
4. To include the United Way logo (or indicate United Way partner agency) on annual reports, all written material, and to state in all publicity (news articles, etc.) that the agency is a United Way partner agency **EXCEPT FUNDRAISING MATERIALS**. The United Way logo must utilize approved branding and trademark standards.
5. To abide by the United Way Agency Relations Manual.
6. To accept the allocation of funds made to it by the Board of Directors after being given full and considerate hearing and accept any adjustments to the original apportionment of funds as decided by the United Way Board.
7. To present annual financial information in accordance with generally accepted accounting principles as outlined in the Agency Relations Manual.
8. To complete monthly allocation request forms along with quarterly financials and information regarding grant opportunities in development and those submitted. **Financials must include a balance sheet and profit and loss statement.**
9. Submit required Outcome reports quarterly.
10. To attend scheduled agency director meetings or send an agency representative. Allocation checks will be mailed monthly. If unable to attend scheduled meetings, checks will be held until such time as contact is made from an agency representative regarding the missed meeting.

11. Cooperate in the annual campaign effort, encourage, and enlist the participation of its constituency and members in such activities. The agency will annually solicit contributions to the United Way campaign among its employees and its Board of Directors.
12. To keep complete and regular books of account (with most recent IRS Form 990) open to inspection at all reasonable times by a representative of this United Way.
13. To accept the Capital Campaign guidelines as set out in Agency Relations Manual.
14. To submit requests for all fundraisers and special events not listed on annual fundraising form at least **30 days** prior to the scheduled activity for United Way Board approval. (Except in the case of a natural disaster or extreme emergencies, an agency fundraising request can be submitted and will be acted upon as soon as possible by the United Way Executive Committee and Allocation Committee.)
15. To have a non-discrimination policy in which race, color, sex, religion, disability, age, or national origin shall have no bearing upon the selection, assignment, or promotion of employees and/or volunteers, or upon the utilization of agency services, and to comply with Federal and State Civil Rights, Employment, and Americans with Disabilities Act Regulations.
16. The Agency will **NOT** conduct fundraising activities, or solicit corporate employees, during the period of **August 1** through **October 31** each year.
17. Partner agencies are encouraged to apply for governmental and foundation grants to supplement their programs.

All partner agencies must submit a signed Agency Agreement. This agreement shall be binding for the period covered by the allocation packet and must be renewed annually. Either party may terminate this agreement provided at least 30 days written notice is given to the other party.

The United Way Board of Directors is empowered to take whatever action is deemed necessary to enforce the provision of the Agency Agreement.

Upon withdrawal from the United Way, a partner shall be entitled to receive from this organization any monies especially designated to it by contributors up to date of withdrawal in excess of those funds that have already been paid to it.

Our agency has read and agrees to the partnership with the United Way of North Central Oklahoma, Inc., and we understand that violations of this agreement could result in decrease of allocations.

AGENCY NAME

PRESIDENT'S NAME

PRESIDENT'S SIGNATURE

DATE

DIRECTOR'S NAME

DIRECTOR'S SIGNATURE

DATE