

**HIGH COUNTRY UNITED WAY**  
**and**  
**PARTICIPATING AGENCY**  
**MEMORANDUM OF AGREEMENT**

This document is intended to clarify the mutual belief that the primary responsibility of High Country United Way is to its Participating Agencies. However, both High Country United Way and its Participating Agencies recognize that High Country United Way has considerable responsibility to its contributors to exercise discretion in establishing realistic campaign goals and in allocating and distributing funds according to program services and priority of service needs.

NOW THEREFORE IN CONSIDERATION OF THE MUTUAL PROMISES AND COVENANTS CONTAINED HEREIN, HIGH COUNTRY UNITED WAY ("HCUW") AND \_\_\_\_\_, (HEREAFTER, "AGENCY"), AGREE TO THE FOLLOWING TERMS AND CONDITIONS:

**AGENCY COVENANTS AND ACCEPTANCE OF CONDITIONS FOR PARTICIPATION  
AND RECEIPT OF FUNDING FROM  
HIGH COUNTRY UNITED WAY**

For and in consideration of its fiscal year 2018-19 allocation from HCUW for Agency in the amount of \$\_\_\_\_\_ for \_\_\_\_\_, to be paid in quarterly installments, unless otherwise provided herein, the Agency agrees to the following terms and conditions:

1. Recognize HCUW at Agency fund raising events and in publicity by use of the HCUW name and logo in materials produced such as annual reports, newspaper releases, internet (web page) publications, brochures, etc. to strengthen public identification of the financial affiliation between HCUW and Agency, thereby increasing the potential financial support of both organizations;
2. Prepare and adopt a balanced budget based upon the available funds;
3. Conduct its operations in accordance with its budget;
4. Agencies with budgets over \$300K must submit an audit every three years with a financial statement prepared by an independent CPA (compilation) submitted in the off years. Those organizations with budgets \$100k to \$299K must submit an audit, a CPA Review, or compilation. Organizations with budgets less than \$100K must submit an audit, a CPA review, or tax returns/internal financial statements. However, if said organization is required to have an audit by some other oversight group or is required by organization's Board of Directors, then the HCUW requires copy of said audit. The HCUW reserves the right to require an audit or CPA review of any organization considered for funding.
5. Contribute staff and volunteer help, whenever possible, to HCUW in its campaign to include events, mailings, and other activities;
6. Maintain accurate and complete records of financial and program information for use in the HCUW campaign;
7. Notify HCUW in a timely manner and in writing of any substantive change to the program that HCUW funds;

8. Use the HCUW funds only for the program approved for funding by HCUW;
9. Submit documentation, as requested by HCUW, to support progress and outcomes for the program or programs that HCUW funds;
10. Conduct no fund raising that would knowingly conflict/compete with a High Country United Way fund raising event.

**HIGH COUNTRY UNITED WAY COMMITMENTS AND OBLIGATIONS TO ITS  
PARTICIPATING AGENCIES AND RESERVATION OF RIGHT TO REDUCE OR MODIFY  
FUNDING ALLOCATION**

1. Respect Agency's prerogative of determining its own policies and programs within the community, as long as such policies and programs are consistent with HCUW bylaws;
2. Provide adequate budget review by responsible committees of citizens to assure expenditures of funds meet priority needs of the community;
3. Set campaign goals with due respect for the financial needs of the participating agencies, the economic climate, the community's fund-raising potential and the long-range goal of HCUW, which is important to both the agencies and contributors;
4. Conduct an annual campaign for funds and use its best efforts to raise the largest amount possible, consistent with the needs of the community as determined by HCUW;
5. Act as a responsible steward of funds publicly contributed to HCUW by fully informing contributors of the allocations and use of such funds;
6. Submit all its financial records to an annual audit by an independent public accountant;
7. Respect the confidential nature of any data submitted to it by Agency;
8. Pay the Agency quarterly unless special arrangements are required;
9. Notwithstanding any prior or current notification or acknowledgement of an annual funding allocation to the Agency, HCUW reserves the right to modify or reduce the Agency's current year's allocation in the event that funds received pursuant to its annual campaign are insufficient to enable HCUW to meet its current year obligation to its participating agencies at the annual allocation level originally provided, or in the event that HCUW experiences unanticipated and extraordinary financial obligations apart and aside from its financial obligations to its participating agencies, including its own operating requirements, casualty losses, or the satisfaction of other financial obligations not previously anticipated.

**MUTUAL COVENANTS OF HIGH COUNTRY UNITED WAY  
AND PARTICIPATING AGENCY**

1. Maintain an active, rotating Board of Directors structure which assumes and fulfills the responsibility of managing its affairs within the scope and spirit of respective bylaws and this agreement;
2. Provide needed services on a nondiscriminatory basis;
3. Strive to increase the public's understanding and appreciation of and participation in human service programs;
4. Consult and work together on matters of common interest in an effort to achieve the best interests of the community as a whole;
5. Work with other organizations, both private and public, throughout the state in meeting the needs of the community and in preventing duplication of services and in promoting the capacity of people to care for one another;

6. Engage in an effective public relations program in which the objectives, services and accomplishments of the Agency, and HCUW support of such services, are adequately publicized to the citizens in the applicable counties;
7. Keep each other informed on all matters of common concern and consult each other when problems or misunderstandings arise to reach solutions that are in the best interests of the community;
8. Conduct periodic self-evaluations as a means of updating and improving services and operations;
9. Carry out the programs of the Agency and HCUW in such a manner as will best meet the needs of the community and will be consistent with high standards of service, efficiency, best practices, and economy; Comply with all regulations and laws of the state and federal governments pertaining to the proper licensing and requirements of not-for-profit organizations;
10. Establish and maintain an affirmative action policy regarding the employment and advancement of staff.

**HIGH COUNTRY UNITED WAY**

\_\_\_\_\_  
By:

\_\_\_\_\_  
By:

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Board Chair

\_\_\_\_\_  
Board Chair

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**HIGH COUNTRY UNITED WAY**  
**ANTI-TERRORISM COMPLIANCE MEASURES**

In compliance with the USA PATRIOT ACT and other counterterrorism laws, High Country United Way requires that each agency certify the following:

“I hereby certify on behalf of \_\_\_\_\_  
(agency name) that all United Way funds and donations will  
be used in compliance with all applicable anti-terrorist financing  
and asset control laws, statutes and executive orders.”

By: \_\_\_\_\_  
Executive Director

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Board Chair

Date: \_\_\_\_\_