

2026-2027 AGENCY AGREEMENT

Reporting

Agencies funded under the new collective impact model shall complete a mid-year and final report by the submission deadline consisting of notable program information, including demographic data, year-to-date updates to the agency's Results-Based Accountability metrics, program highlights, client testimonials and any additional insights.

Agencies receiving step-down allocations that have not been selected for funding under the new collective impact model will submit quarterly reports to United Way verifying funding usage.

The agency shall submit any additional reports as requested. Late or incomplete reporting could result in decreased funding.

Use of Funds

The agency may use allocated funds in any manner that supports its mission, operations, and overall impact. United Way does not impose restrictions on how the funds are allocated within the agency. However, the agency is expected to use the funds responsibly and in alignment with its stated purpose of serving the community.

Marketing / Fundraising

- The agency shall use the provided United Way of Florence County localized logo on its website (linked to uwflorence.org) and at its public functions.
- The agency shall assist United Way in participating in campaign presentations upon request.
- The agency shall refrain from encouraging individual and/or institutional donors to designate donations to a specific program and/or agency through the United Way campaign.

Stewardship

- The agency shall cooperate with other community agencies to avoid duplication of services.
- The agency shall carry out all programs with consistently high standards of service, efficiency, and economy.

Budgeting / Recordkeeping

- The agency shall prepare and implement a balanced budget for programs included in the agency's application to the United Way. The agency shall maintain complete and accurate financial records for the agency.
- The agency will make those financial records available to United Way upon reasonable request.

Financial Transparency

The agency shall undergo a financial report by a licensed, independent public accountant and submit a copy of the report.

- If the agency's total operating cost is more than \$1,000,000, the agency must undergo an annual audit.
- If the agency's total operating budget is between \$500,000-\$999,999 the agency must undergo an annual financial review.
- If the agency's total operating budget is less than \$500,000 the agency must undergo an annual financial compilation.

United Way of Florence County reserves the right to request additional financial documents as deemed appropriate. The agency will comply with all government regulations including the USA PATRIOT ACT certification.

By signing, you agree to the terms set forth and understand that an agency found to be in violation of these terms will undergo investigation that could lead to revocation of Partner Agency status and loss of current and future funding from the United Way of Florence County.

Agency Name

Agency Executive Director Name (Printed)

Agency Executive Director Signature

Date