



United Way of Greater Simcoe County  
136 Bayfield Street, Suite 100, Barrie, ON L4M 3B1  
Tel: (705) 726-2301 Fax: (705) 726-4897

## Single-Year MEMORANDUM OF AGREEMENT

### *BETWEEN:*

The United Way of Greater Simcoe County ("UWGSC") and \_\_\_\_\_  
(hereinafter referred to as "The Agency")

### *AGREEMENT:*

In signing this agreement, the UWGSC and The Agency enter into a financial alliance for the fiscal year \_\_\_\_\_.

### **Both Partners agree to:**

Maintain a responsible and representative governing body such as a Board of Directors that establishes financial, administrative and program policies and procedures to ensure independent operation.

Maintain books of account to provide adequate financial information on the organization's operations.

Communicate regularly on matters of mutual interest.

Communicate with the public through the media or other means, to keep the mission and services of The Agency and the UWGSC in the foreground of community awareness and to illustrate the partnership.

Co-operate with other agencies and funders to prevent program or reporting duplication and to make a sincere effort to consider the communities' overall needs in planning programs.

Comply with the provisions of the Supplementary Fundraising Agreement (2006) of the UWGSC (as attached).

### **The Agency agrees to:**

1. Participate actively in the annual UWGSC fundraising campaign.
2. Clearly identify the UWGSC partnership on all printed material, signs, advertising and promotions.
3. Provide notice to the UWGSC at least sixty (60) days before launching a fundraising program.
4. Spend all monies received from the UWGSC in accordance with the current Funding Agreement.
5. Provide semi-annual progress reports as required by UWGSC (mid-November & mid-May).

Should The Agency be unable to meet any of the above criteria/expectations, a formal agreement approved by the UWGSC Board shall be signed and shall form part of this agreement.

**The United Way of Greater Simcoe County agrees to:**

1. Recognize The Agency as a United Way Member Agency.
2. Ensure that Allocations are made following a thorough review of applications.
3. Ensure that The Agency is aware of the rationale for the allocation decision, and has access to an official appeal process.
4. Renegotiate program and reporting expectations if funding is approved at a lower level than requested.
5. Respect the autonomy and uniqueness of The Agency, subject to the above.
6. Remit on a monthly basis, over the fiscal year, the allocation committed to The Agency, subject to section 7 below.
7. Discuss with The Agency any adjustments of allocations that may be necessary in the event of a campaign shortfall.
8. Conduct an annual fundraising campaign and other fundraising activities to provide funds for community programming.
9. Provide opportunities to participate in UWGSC planning and decision-making that affects member agencies.
10. Assist, wherever possible, The Agency in achieving its objectives.
11. Provide access to Training & Consulting Services as required and as available, and act as a clearing house to provide opportunities for sharing of expertise and knowledge among member agencies.
12. Provide notice to The Agency at least sixty (60) days before launching a fundraising program outside of the Campaign Period.
13. Make available audited financial statements prepared annually by a licensed public accountant.

In the event of a violation by either party of its obligations herein, the other party shall have the right to terminate this agreement on thirty (30) days written notice and opportunity to cure. The parties hereby acknowledge that the UWGSC also reserves the right to adjust the allocation to The Agency or terminate the multi-year funding in the event of a violation of the obligations of The Agency set out herein. Any costs incurred by a breach of this agreement shall be covered by the party causing the breach.

This agreement shall be in effect until \_\_\_\_\_, unless terminated pursuant to the terms of this agreement.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ in the year \_\_\_\_\_ .

**United Way of Greater Simcoe County**

**Agency**

Per: \_\_\_\_\_ Per: \_\_\_\_\_  
Designated Signing Officer Executive Director

Print Name: \_\_\_\_\_ Print Name: \_\_\_\_\_

Title: \_\_\_\_\_ Per: \_\_\_\_\_  
Board of Directors' Designated Signing Officer

Print Name: \_\_\_\_\_

Office: \_\_\_\_\_

