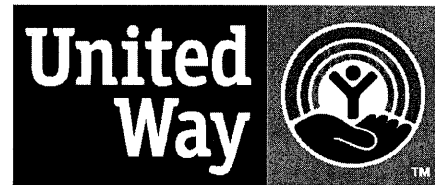


United Way
of Southern Kentucky



POLICIES AND PROCEDURES FOR FUNDED AGENCIES

Adopted: May 1998
Revised: May 2001
Revised: October 2006
Revised: March 2009
Revised: June 2012
Revised: June 2014
Revised: November 2015

I. THE UNITED WAY ORGANIZATION

A. HISTORY, MISSION, STRATEGIES AND STRUCTURE

The United Way of Southern Kentucky was incorporated as a charitable nonprofit in 1956. It has long served a major role in the community by bringing people together to raise money and distribute funds to health and human service agencies. Because the United Way is a steward of the community's funds, it has a critical charge to manage that money in the most responsible way possible. Every aspect of the organization should reflect the efficiency, accountability and effectiveness that the donors to United Way expect.

The United Way values are to be:

- Responsive to community needs
- Results-oriented and accountable
- Volunteer driven
- Flexible and open
- Inclusive
- Fair
- Respectful of funded agencies

The United Way vision for Southern Kentucky is a Southern Kentucky where all residents are educated, healthy, and financially stable. As such, the mission of United Way of Southern Kentucky is to be the **leader in bringing together the resources to build a stronger, more caring community**. United Way works toward this mission through four primary strategies: fund raising, distributing those funds; maintaining organizational integrity; and, building partnerships throughout the community.

B. PURPOSE OF THIS DOCUMENT

This manual defines the expectations and structure of United Way's funding relationships. Organizations that receive support through the United Way Community Fund should become familiar with all policies and procedures. Failure to follow these policies due to lack of knowledge is not acceptable. By signing a funding contract, agencies have agreed to follow these policies and procedures.

II. UNITED WAY'S COMMITMENT

United Way makes several essential commitments to its customers, key constituents and to the community as a whole. These commitments are outlined on the following pages.

A. CAMPAIGN

Policy: United Way annually conducts a community-wide campaign that raises funds to support health and human services.

Procedures: United Way's commitment in fundraising is to set progressive and realistic campaign goals which are based upon current economic factors and community fundraising

potential. The thrust of the campaign takes place in the fall between mid-August and mid-November. However, United Way strives to remain flexible for companies that cannot conduct campaigns during this time frame.

B. MARKETING AND AGENCY PROMOTION

Policy: United Way makes every effort to communicate the effectiveness and accountability of funded agencies to the public.

Procedures: United Way believes that it supports the best selection of health and human service programs available in the community. Funded agencies meet high standards of performance and efficiency as verified by volunteers involved in the Citizen Review process. United Way publicizes funded agencies through brochures, videos, public speaking opportunities, and facility tours from prospective donors.

The United Way logo is a highly recognized symbol among the general public, representing accountability and integrity. United Way funded programs should place the United Way logo on all related marketing and communications materials, such as newsletters, brochures, fliers, posters, news articles, signage, letterhead, etc. The United Way logo should be visible and consistently used to keep the public aware that United Way supports your organization. This recognition will provide the public with assurance that your program meets local accountability standards and will help keep them aware of how United Way dollars are used.

C. NEEDS ASSESSMENT

Policy: Distributing the Community Fund is guided in part by regularly occurring, in-depth assessments of community needs.

Procedures: United Way conducts a comprehensive needs assessment *on a regular basis*, using current Census data, assessments conducted by other organizations around specific needs, as well as surveys and other research conducted especially for the comprehensive assessment. This assessment is used to set priorities to guide funding decisions. During the intervening years, focused or intermediate assessments may be conducted as required by changing conditions in the community or within United Way. Community agencies are encouraged to share their assessments with United Way, as new information has the potential to affect United Way's funding priorities.

D. EMERGENCY RESERVES

Policy: United Way is committed to providing a stable source of funding for local health and human service programs that operate within high standards of governance and financial accountability.

Procedures: To ensure stability, United Way maintains a minimum 90-day emergency reserve fund that is used at the discretion of the United Way Board of Directors. These funds are set aside to ensure that agency funding and the United Way operating budget can be maintained for up to three months in the event of a major emergency. Business closings, mergers, major lay-offs, and other economic factors beyond United Way's control have the

potential to impact United Way's ability to collect a significant portion of pledged campaign dollars or significantly reduce the amount available for distribution.

E. AGENCY RELATIONS

Policy: United Way is firmly committed to helping build and maintain a network of strong, effective human service agencies by providing funding, consultation, technical support, and community recognition for the important work of the agencies. United Way respects the autonomy and self-governance responsibility of funded agencies and supports this autonomy.

Procedures:

1. COMMUNICATION WITH AGENCIES

The United Way strives to maintain open lines of communications with its funded agencies, and to keep them informed of all decisions that impact these relationships.

2. TECHNICAL SUPPORT

United Way volunteers and staff are available to provide technical support to funded agencies as the need arises. Management assistance is available through volunteers and staff with a broad array of expertise in administration, finance, personnel, technology, marketing, board development, by-laws, and other key nonprofit management areas. In order to receive volunteer assistance, an agency must identify the specific kind of assistance needed, the desired result of the assistance, the time frame for the project, and agency board and staff who will work with the assigned volunteer or United Way staff member.

3. ACCOUNTABILITY

Fundamental to United Way's ability to attract contributions from donors in the community is its ability to ensure local accountability. It is primarily through the Citizen Review process that accountability is demonstrated to the community. No single factor in the review process is the basis for funding decisions. Rather, United Way volunteers weigh many factors against all funding requests to arrive at decisions. Such factors include United Way priorities, other funding requests, proposed budgets, dollars available, and current and proposed program outcomes.

United Way is particularly interested in funding programs that make a difference in the lives of people with human service needs. For this reason, United Way volunteers base their decisions, in part, on the agency's ability to demonstrate program outcomes. While no funding decision is made solely on outcome information, it is very important to United Way and community donors that program funding results in positive outcomes for service consumers.

The budget review is also an important component to the allocations process. In reviewing proposals, United Way volunteers expect that the presented financial data demonstrate that the agency operates its programs(s) with a balanced budget and within funding commitments. All financial information should be accurate and as up to date as possible. United Way funds must be used for the general purpose for which they were allocated.

F. MINIMUM STANDARDS FOR UNITED WAY FUNDED AGENCIES

Policy: United Way is interested in funding agency programs that can demonstrate that they meet *Standards of Governance, Use of Funds, and Administration (Appendix A)*.

Procedures: United Way has a strong reputation for having high standards for funded agencies, and United Way donors expect that their dollars are used to support agencies which strive to meet these standards. The Minimum Standards for United Way Funded Agencies is a listing of the basic expectations that United Way has of agencies receiving funding.

III. THE COMMUNITY FUND

Policy: The **Community Fund** is defined as money raised annually by United Way which is distributed by the board of directors of United Way to fund programs implemented by local agencies in order to effectively address the critical health and human service needs in United Way of Southern Kentucky's service area. The Community Fund is distributed through an annual, volunteer driven process. As recipients of community funds, agencies operating these programs accept a general stewardship responsibility.

Procedures: The Board of Directors oversees the management of the Community Fund. United Way funds programs using the following rationale: United Way dollars are directed to 1) programs and services which address recognized community needs as identified through United Way needs assessments; 2) programs which United Way funds can impact; 3) programs which community donors are interested in supporting; and 4) programs which demonstrate positive outcomes for the people served.

The process used to make funding decisions is called **Citizen Review**. This is an important element of United Way's approach because it ensures that funding decisions are made by the community. A broadly representative group of volunteers from the community review and analyze program proposals and make recommendations to the United Way Board of Directors.

Donors express particular interest in funding positive results for people served. As such, United Way volunteers direct much of their attention to reviewing the successes of the programs considered for funding. Each program is required to establish clear objectives for their services, measure the success of such objectives and demonstrate the benefits realized by the people served by the program. This information is used to demonstrate the value of the funded programs and to determine the impact of such programs on community needs.

Contributions through the United Way that are undesignated or designated to United Way of Southern Kentucky comprise the **Community Fund**. Funds raised in the fall annual campaign are earmarked for distribution the following spring, obligated by the board in the second quarter, and distributed monthly or quarterly beginning in July.

A. ALLOCATIONS TO AGENCIES

1. PURPOSE

The purpose of allocations is to provide support to agencies for a variety of needed programs that provide services for people in the United Way service area.

Policy: United Way dedicates a major portion of the Community Fund to provide support to agency programs which meet United Way's Minimum Standards, address important community needs, and participate in United Way activities, such as fundraising, Citizen Review and community planning.

Procedures: The yearly Citizen Review process allows community volunteers to review the program results, finances, operations, accountability measures, and management of each funded program. Citizen Review ensures that the United Way Community Fund is being spent wisely and is positively impacting people in our community.

2. PROCESS AND STRUCTURE

The agency's role in the Citizens' Review is one of providing accurate and concise verbal and written information about its programs and its overall operations. The method used for agencies to provide such information may be periodically revised.

Proposal Preparation: Information sessions, pre-review of applications and additional technical assistance are offered to agencies prior to the deadline for submitting the proposal. Program budgets should be fully reviewed by a key agency board member, assuring that there is full justification for the funds requested prior to submission to United Way for consideration.

United Way Volunteers: The Citizens Review process is strictly volunteer-driven. Allocations Committee members are recruited locally from throughout the community, and are required to attend training that orients them to United Way, the Citizen Review process, and their responsibilities as team members. The volunteer committees make funding level recommendations to the United Way Board of Directors.

United Way Board of Directors: The United Way Board of Directors makes the final decision about program and funding recommendations.

Allocations Follow-up: Upon funding approval, agencies will receive a letter notifying them of the Board's action, a rationale for the funding amount approved, the annual Agreement (Appendix B), and funding conditions, which are considered an addendum to the Agreement. The Agreement specifies the expectations of the funding arrangement and may restate or refer to policies in the Manual as needed. At the request of either the agency or the committee chairs, exit interviews may be scheduled to discuss the funding rationale. All agencies have an opportunity to appeal the board's action as described in the Appeals policy in this manual.

IV. FUNDED AGENCIES

Policy: Funded agencies are expected to comply with specific United Way standards, as the standards apply. Failure to meet these standards is grounds for denying admission, probation, phase-out funding, or termination of funding.

Procedures: Agencies must demonstrate that they meet all of United Way's standards, unless otherwise exempted by law or circumstance. Any agency that does not meet all

of the standards must commit to meet all of the minimum standards in a mutually agreed to timeframe.

A. TERMINATION

There is no guarantee of indefinite program funding by United Way. Reasons for termination vary and depend upon the decisions of community volunteers, United Way Board of Directors and the agency itself.

B. FUNDED AGENCY COMMITMENT

The following policies apply to all agencies with a funding relationship with United Way through the citizen review process.

1. REPORTING

Policy: In accordance with United Way's standards, agencies with operating budgets of \$500,000 or more must submit an independent audit with full disclosure conducted by an independent certified public accountant annually. Agencies with operating budgets of \$100,000-\$499,000 must submit a review completed by a certified public accountant, and agencies with budgets less than \$100,000 can submit a Compiled Financial Statement prepared by an independent certified public accountant. Audits, Reviews and Compiled Financial Statements should include: Statement of Activities, Statement of Financial Position, Statement of Cash Flows and Statement of Functional Expenses. All financial reports must encompass all agency funds and transactions and must be prepared on an accrual basis, following Generally Accepted Accounting Principles.

Procedures: Audits, Reviews and Compiled Financial Statements are due 150 days after the close of the agency's fiscal year. If circumstances warrant, a written 30-day extension may be requested, bringing the total to 180 days. Beyond that point, funding will be withheld until the audit is received.

2. UNITED WAY CAMPAIGN

Policy: Funded agencies are expected to participate fully in the United Way campaign effort every year.

Procedures: Agency staff is not required to contribute to United Way. However, agency directors are expected to set an example for the United Way campaign and provide staff with the opportunity to contribute by allowing a volunteer to directly solicit contributions from employees during the United Way campaign. This procedure would not apply to agencies without paid employees.

3. CO-MARKETING

Policy: Each agency is expected to publicly acknowledge its relationship with United Way, and to promote local giving through United Way during the annual campaign. United Way's ability to raise funds from the local community is deeply dependent upon the help and positive public support of the agencies that receive funds from the Community Fund. Agencies should use public service announcements, brochures and

fliers, and public speaking engagements as opportunities to promote its relationship with United Way as well as the added value of United Way's Citizen Review process.

If the funding relationship ends, use of the United Way logo in co-marketing must cease.

Procedures: All materials created to inform the community about a specific program which received United Way funding must include an acknowledgement of this support and display a United Way logo. Please contact United Way for logo slicks and information on placement and use.

4. SUPPLEMENTAL FUND RAISING

Policy: Recognizing that United Way funds only a portion of any agency's budget, supplemental fundraising is necessary. As noted in the co-marketing policy in this manual, each agency is responsible for recognizing its relationship with United Way in any written materials promoting the agency or any related fundraising effort.

There are two restrictions on fundraising conducted by funded agencies with one or more funded programs:

- 1. No solicitation of corporate funds for monetary support.** There are circumstances, however, in which an agency can solicit gifts from specific companies. The only circumstances are:
 - Solicitation for capital expenses;
 - Solicitation for donation of company products; and
 - Solicitation for sponsorship of specific fund-raising events.
- 2. No solicitation of employees in the workplace.** Funded agencies can never conduct employee workplace giving campaigns

Procedures: *United Way considers all agency fundraising plans on a case-by-case basis.* Agencies are required to annually submit fundraising plans to United Way as a supplement to the program proposal for funding. United Way may contact the agency as needed to clarify the scope and purpose of specific fundraising efforts upon reviewing such plans. Unless notified otherwise, the plan will be considered approved by United Way upon signing the annual Agreement.

Requests for exceptions to the restrictions outlined in this policy, or for additional events not presented in the annual funding proposal, must be presented in writing to the United Way President. The agency must receive written approval before engaging in fundraising that conflicts with this policy.

It is extremely important that Funded Agencies comply with this policy consistently. Failure to do so could be detrimental to the fundraising abilities of both the agency and United Way. If United Way becomes aware that the policy is not being followed, the agency will be contacted by United Way to alert the agency of the problem. In addition, violation of the policy will result in a meeting between the agency and representatives of United Way, who will recommend appropriate action to the United Way Board of Directors. After review of the United Way Representatives recommendation, the United

Way Board will determine final action including, but not limited to, a written warning, monetary fine, surrender of funds raised in the violation, reduced allocation, probation or termination.

V. GENERAL POLICIES

The policies outlined below apply to any agency receiving United Way funds.

A. PROGRAM FUNDING

Policy: In its efforts to ensure accountability and fund services addressing priority needs, United Way chooses to fund specific programs. A program is a service or group of related and supportive services that work together to accomplish specific outcomes. A program has one budget, and is typically one of several ways an agency operates to fulfill its mission.

Procedures: It is important to write United Way funding proposals with specific information about the program(s) for which funding is requested, the amount of funding needed, and the specific purpose or use of the funds being requested. Any significant changes to funded programs of Funded Agencies must first be approved by the United Way before a funding request will be considered.

B. FUNDING DISBURSEMENTS

Policy: United Way funds are distributed during a July 1 – June 30 funding year.

Procedures: United Way allocations are transferred electronically or paid by check. ACH payments are processed and are deposited in the agency's checking account on the 7th day of the month (or the closest business day if the 7th falls on the weekend), for either a monthly or quarterly distribution. Check payments are forwarded on the 7th day of the month, for either a monthly or quarterly distribution. Programs which demonstrate an erratic cash flow over a period of time may request a special payment schedule prior to the beginning of the fiscal year. Unplanned changes in the payment schedule are viewed as warning signs of financial troubles. Any deviation from a one-twelfth, monthly payment or a one-fourth quarterly payment (whichever applies), must be requested in writing to the President of the United Way.

C. AGENCY RESERVES

Policy: United Way does not fund agency reserves.

Procedures: All requests for funds must be for a specific program that provides services to the community. However, United Way does encourage agencies to build its security by establishing a board-designated reserve fund. United Way suggests that a reserve equal the amount of funds needed for a three month (90 day) operating period as a sound management practice. Agencies with facilities to maintain may accumulate up to six months. Funding may be reduced if an agency maintains a reserve in excess of six months without a specific, time-limited plan.

D. ADMINISTRATIVE FEES

Policy: United Way funds cannot be used for non-program directed administrative fees and costs.

Procedures: United Way Funds can only be utilized to fund specific program expenses related to the delivery of services that address Education, Income, Health, and Safety Net.

E. CAPITAL FUNDRAISING

Policy: United Way program funding is not to be used for capital expenditures (defined as equipment or facilities expenses exceeding \$500).

Procedures: Any United Way funded Agency wishing to undertake a capital campaign of any amount which will include the solicitation of corporate gifts must submit such a request in writing to the United Way President.

F. NON-PROMOTION OF DESIGNATIONS

Policy: All funded agencies agree not to promote designations and agree instead to promote the United Way Community Fund as the most effective way to help the most people.

Procedures: The intention behind this policy is to avoid popularity contests among agencies in times of tight budget dollars and to promote the concept of leveraging one's gift with the gifts of others to make a bigger difference in meeting community needs. It also helps to provide grant funds that can only come through undesignated donations. Any agency promoting designations to itself or any other organization risks termination of its relationship with United Way.

G. NON-COMPLIANCE WITH UNITED WAY POLICIES

Policy: All United Way funded organizations are expected to adhere to all applicable policies, supporting procedures, and other directions outlined in this manual, the funding agreement, and/or funding contingencies.

Procedures: United Way and its funded agencies are expected to act in good faith in carrying out all conditions of the funding relationship, which are spelled out in funding agreements, this manual, and contingencies placed on any allocation. If good faith efforts fail, both parties reserve the right to terminate the relationship.

MINIMUM STANDARDS FOR UNITED WAY FUNDED AGENCIES

ELIGIBLE SERVICES

The agency must offer programs directed toward addressing Health, Education, Income and Safety Net needs to the residents of the United Way service area in a meaningful fashion. Generally, an organization would not be considered that is organized primarily for religious or political purposes. These categories are defined as follows:

- A. Religious: support to propagate the faith of any particular religion or sect. This does not include non-denominational services available to the public such as food banks. Such an organization must clearly distinguish, in budget and program, a demarcation between its human/social services and religious services.
- B. Political: substantial lobbying, non-human service related advocacy and/or partisan political activity so as to be eligible for tax exempt status.

GOVERNANCE

1. The agency is incorporated.

Documentation: articles of incorporation

2. The organization is a nonprofit with tax exempt status under the IRS code.

Select Status: 501(C)(3)_____ Other (Please list status)_____

Has own IRS Determination_____ OR

Subsidiary Covered Under Another Organization's IRS Determination_____

Documentation: determination letter from IRS

3. The agency is governed by a board (consisting of at least nine volunteer members) that meets regularly (at least four times a year), operates with a quorum and records minutes of all meetings.

Documentation: board of directors list, copies of minutes of board meetings held last year recording the date and time of the meeting and the names of those present

4. The agency volunteer board is governed by bylaws which are reviewed annually and ratified or revised as needed.

Documentation: bylaws or constitution; most recent review of bylaws, most recent revision of by-laws

5. Board members must serve without compensation. No paid staff of the agency may serve as a voting member of the board.

Documentation: payroll records

6. The board controls the fiscal affairs of the organization, including the development and adoption of an annual budget and written financial policies and procedures.

Documentation: budget, financial statements and balance sheet distributed to board members and minutes recording acceptance; written financial policies and procedures, 990 tax filing form (if required).

7. The agency must have been actively conducting business for at least two years.

Documentation: financial records

USE OF FUNDS

8. The agency with an annual budget of \$500,000 or more has an independent audit; agencies with an annual budget of \$100,000-\$499,000 has a review completed by a certified public accountant; or, in the case of an agency having a budget below \$100,000, a compilation conducted annually by a certified public accountant.

Documentation: audit with management letter or compilation

9. The agency must be willing to comply with all financial reporting requirements.

Documentation: submitted reports

10. The agency has outlined its goals in a long range or strategic plan and the use of funds is in accordance with the mission.

Documentation: long range plan

11. Each program has an annual operational plan with quantifiable outcomes that specify the results to be achieved during the defined time period.

Documentation: program objectives

12. There is a system in place to measure progress on achieving outcomes and to report progress to the board.

Documentation: indicators for measuring outcomes and board minutes that record reporting progress to the board

ADMINISTRATION

13. The agency has insurance coverage commensurate with the risks associated with its programs (property, general liability, professional liability, fidelity bond, directors' and officers' liability, vehicle, etc.).

Documentation: certificates of insurance for all policies

14. The agency has an affirmative action policy or a policy on cultural diversity for its staff, governing body, and services.

Documentation: affirmative action policy/policy on cultural diversity

15. The staff is sufficiently qualified by training and experience.

Documentation: job descriptions and minimum qualifications

16. The agency has written personnel policies approved by the board and available to the entire staff.

Documentation: personnel policies

17. Facilities meet applicable federal, state and local codes, including access, fire and safety codes.

Documentation: third party inspection results as may be required by state and federal laws

18. The organization conforms to key Sarbanes-Oxley Act standards.

Documentation: Code of Ethics, Policy prohibiting loans to employees

AGREEMENT

Between

«Agency_Name»
(hereinafter referred to as the Agency)

and

United Way of Southern Kentucky
(hereinafter referred to as United Way)

Covering the period July 1, (Year) through June 30, (Year)

Program(s):	Funding Amount(s):
«Program_Name_1»	\$«Amount_1»
«Program_Name_2»	\$«Amount_2»
«Program_Name_3»	\$«Amount_3»
Total United Way Allocation:	\$«Total»

This agreement is entered into in the belief that (a) the participation of local volunteers in community planning, fund distribution, communications and fundraising is essential; and (b) consideration of the needs of the community in the establishment, maintenance and improvement of effective human services form the basis for this working relationship.

As parties to this agreement:

- I. Both United Way and the Agency agree:
 - A. To maintain a responsible and representative governing board which meets regularly during the year to carry out the purposes for which it is organized.
 - B. To keep each other informed on all matters of common concern and to consult together when problems or misunderstandings arise, in order to reach solutions in the best interest of the community.
 - C. To conform to policies and procedures governing the United Way funding relationship.
 - D. To strive to increase the public's understanding and appreciation of and participation in human service programs.
- II. The United Way agrees:
 - A. To recognize the responsibility of the Agency's board to determine its own policies and manage its own affairs.
 - B. To keep channels of communication with the board of directors and its various committees open to the Agency.

- C. To provide annual program and budget reviews by responsible volunteer committees and to direct funding toward programs which meet its standards of accountability and which address important community needs.
- D. To conduct an annual campaign for funds and to execute its best efforts to raise the greatest amount possible to support community needs.
- E. To be a responsible steward of funds contributed to United Way by:
 - 1. Fully informing contributors about use of funds.
 - 2. Honoring donor wishes.
 - 3. Submitting all appropriate records for an annual independent audit.
- F. To publicly promote the identity and accomplishments of the Agency's funded program(s) whenever possible and appropriate and to assist the Agency in its year-round education of the community.
- G. To pay the agency monthly (Warren County) and quarterly (Partner Counties) after its allocation has been determined, unless the agency fails to fulfill any condition of this agreement or unless the parties have agreed in advance to a different payment schedule.

III. The Agency Agrees:

- A. To maintain its status as a non-profit organization and to conduct its operation in a manner that will not jeopardize that status and the exemption under federal and state laws.
- B. To meet all applicable United Way Minimum Standards for Funded Agencies by the dates indicated and to provide related supporting documentation to United Way as requested.
- C. To coordinate with and give full support to the United Way and to the annual campaign, demonstrated by conducting a United Way campaign within the Agency, and participating in campaign-related events to ensure the success of the annual campaign.
- D. To submit program proposals on the forms provided and at the times designated and to participate in the Citizen Review process.
- E. To accept the allocation of funds made to the agency for the current year and to operate within the United Way's policies as outlined in the manual entitled "Policies and Procedures for Funded Agencies."
- F. To assure that funds are used to achieve desired results as outlined in the program proposal.
- G. To provide United Way with annual audits or financial reviews, annual financial reports, service statistics, and program results in the form and at the times designated.
- H. To display the United Way logo at facilities receiving United Way support, to recognize in public United Way's financial support of the funded programs and to include references including the United Way logo in printed materials produced by the agency such as letterhead, annual reports, brochures, posters and news releases in order to strengthen public identification of United Way with the Agency.
- I. To address annual Allocations Committee funding conditions, if any, as detailed in Attachment A.

- J. To keep its program fees and charges commensurate with the cost of services rendered, the nature of the program, and the ability of the participants to pay (if applicable).
- K. To work with other organizations, both private and public, in meeting the needs of the community, in preventing unnecessary duplication of services, and in promoting high standards of efficiency and effectiveness.
- L. To conduct all local fundraising in accordance with United Way policy.
- M. To NOT initiate contact (in writing, by phone, in person, by e-mail or any other communications method) with any United Way Allocations Volunteer either before, during or after the allocations process for the purpose of discussing any element of the funded program. This applies to agency staff, board of directors and volunteers. Violation of the policy may result in a reduction in the program's final allocation for the coming year.

This agreement shall be binding through June 30, (Year).

Failure by United Way on any occasion to require strict compliance with any provision of this agreement shall not constitute a waiver of such agreement. No waiver of any of the provisions of the agreement shall be deemed to constitute a waiver of any other agreement or provision whether or not similar, nor shall any waiver constitute a continuing waiver. No waiver shall be binding unless it is made in writing. This agreement may not be modified or amended except by a writing signed by both parties.

«Agency_Name»

By: _____
(President or Chairman)

(Executive Director)

Date: _____

United Way of Southern Kentucky

By: _____
(Chairman)

(President)

Date: _____