



# 2018 GRANT APPLICATION

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## Check list

\_\_\_ Section 1 – Organizational Information signed and dated

\_\_\_ Section 3 – Financial Information – No audit is required, but be prepared to furnish one if asked.

\_\_\_ Section 5 – Certifications

- Attach IRS 990 – front page only
- Attach copy of Board Roster and minutes from the last quarter

\_\_\_ Section 6 – Standards of Affiliation – Attach 501(c)3 letter of determination

\_\_\_ Section 8 – Counterterrorism Compliance signed and dated

\_\_\_ Section 9 – Certifying Official’s Statement signed and dated

**APPLICATION DUE DATE: WEDNESDAY, AUGUST 31, 2017 AT NOON**



St. Landry-Evangeline United Way

## **GRANT APPLICATION, GUIDELINES and GENERAL INSTRUCTIONS**

**St. Landry-Evangeline United Way is investing in our community, measuring results & changing lives.**

### **I. INTRODUCTION**

St. Landry-Evangeline United Way, Inc., a non-profit health and human service organization is seeking to fund programs that address the most critical human needs in St. Landry and Evangeline Parishes. The Community Impact Initiative identifies the major issues to be addressed as Education, Income, Health and Community Basic Needs.

### **II. ELIGIBLE APPLICATIONS**

Partnership with the United Way is available to any qualified 501(c)3 non-profit organization or tax exempt school/government based program providing services to residents of St. Landry and/or Evangeline Parishes in at least one of the Community Impact focus areas. To achieve partner status, agencies must apply and be recommended by the Community Investment Committee and be approved by the United Way Board of Directors.

The ultimate goal of United Way is to set quality guidelines and encourage growth and development for organizations, as well as assure United Way donors that funds are allocated to high-quality, credible programs.

An application for funding does not guarantee funding.

No program should apply for funding that is in excess of 50% of their overall program budget.

### **III. FUNDING PRIORITIES**

United Way funds programs that comprehensively focus on solving the priority needs identified by the United Way Community Impact Initiative as identified by United Way Worldwide. These are (and can include but are not limited to):

#### **EDUCATION: Helping children achieve their potential by addressing the school dropout issue with provision and assurance for school readiness and academic achievement.**

- Programs promoting academic achievement
- Programs boosting on-time HS graduation
- Mentoring/Counseling programs that teach/promote productivity & youth engagement to achieve their potential.
- After school programs that help children achieve their academic potential
- Programs addressing at-risk youth
- School readiness programs; including but not limited to early reading programs
- Adult education classes for high school completion

#### **INCOME: Fostering financial stability by increasing income and savings. Promoting education that fosters financial assets, self-sufficiency and long-term stability.**

- Job training skills and mentoring programs
- Educational programs that address financial stability & money management and budgeting
- Free Income tax assistance for EITC
- Increased income through advocacy, counseling & or vocational training
- Programs that offer education and skills needed to allow home ownership

- Programs that address long-term financial stability by gaining & sustaining assets and building savings

**HEALTH: Promoting and assuring access to healthcare for families. Programs addressing school-based health care, health care coverage, preventative health care, and programs geared to the well-being and healthy lifestyle of elder citizens.**

- Substance abuse prevention
- Rx assistance
- Medical, Dental or Mental Health Assistance
- Healthcare prevention programs that promote avoidance of risky behavior
- Providing nutritious, healthy prepared meals or food stocks for healthy meal preparation
- Providing support services for healthy, independent living

**COMMUNITY BASIC NEEDS: Helping to meet the basic needs for food, clothing, shelter and emergency assistance.**

- Crisis / Disaster relief
- Programs that address basic emergency needs for food and clothing
- Homelessness Assistance in securing safe housing

#### **IV. SELECTION OF FUNDED PROGRAMS**

United Way distributes its grant funds through the Community Investment Committee. This committee is comprised of a diverse group of volunteers from across the parish representing all walks of life. Within this process, volunteers seek to identify and fund the highest quality programs that will provide significant outcomes in addressing critical and priority needs identified by the United Way.

The United Way will award grant funds to selected programs annually. Grants will be awarded on a competitive basis and merit basis to those 501(c)3 entities that demonstrate a solid programmatic plan for meeting the unmet human service needs of the people of St. Landry and Evangeline Parishes. All awards are based on availability of funds and program outcomes.

**Grant recipients shall publicly acknowledge program support through all reasonable mediums and vehicles as a stipulation of accepting the award. The following is the preferred language for press statements: “This project was made possible in part through a grant from the St. Landry-Evangeline United Way, Inc. “**

**All publications, advertising, promotional effort, and marketing materials must prominently display the St. Landry-Evangeline United Way logo, as shown herein and supplied by the St. Landry-Evangeline United Way, Inc. This includes but is not limited to: all items such as printed materials, Website(s), audio/visual materials, displays, banners, exhibits, specialty items, press kits, stationary, t-shirts, and other related promotional items or materials.**

#### **V. PROGRAM FUNDING CRITERIA**

The United Way Board of Directors has established fundamental values that assist Community Investment volunteers in making funding determinations. The following describes the criteria that will guide investment panel members in making funding decisions:

United Way recognizes that prevention strategies that target the reduction of risk factors and/or strengthen resiliencies are both the most cost effective and potent way to address health and human service issues.

United Way believes services should be provided to either reduce clients' levels of dependence or increase levels of independence. A program that demonstrates the ability to increase self-sufficiency of participants or their families will qualify for consideration.

United Way believes in **empowering people** to help themselves or help others. United Way also believes the answer to community challenges already exist in neighborhoods. United Way seeks to assist efforts that will help individuals, groups, organizations and neighborhoods find solutions to community problems and serve as a model for achieving positive results.

United Way encourages all funded programs to actively seek and **utilize volunteers** in an appropriate manner.

United Way supports inclusion. Our first concern is with strengthening the community through our partner agencies who provide the broadest spectrum of services in a **nondiscriminatory** way. Our program management policies require that programs and services are made available and accessible to the broadest spectrum of clients consistent with the partner agency's mission and objectives, without regard to race, religion, nationality, gender, age, ability, disability, sexual orientation or country of origin.

United Way requires all funded programs to be **planned**, managed and implemented in a manner that embraces cultural competency. Funded programs must comply with all laws regarding equal opportunity. United Way encourages funded programs to recruit volunteers and staff who reflect the diversity in the community. Services should reach diverse populations, and be accessible and responsive to individuals with special needs.

United Way encourages all funded programs to be **managed** in a manner that clearly identifies customer/clients, provide formal feedback to decision-makers and measures customer satisfaction / client feedback, utilizing this information to make program improvements.

United Way seeks to invest contributed dollars in programs that have **strategic or cost benefit** advantages for United Way and the community.

United Way encourages and expects that all programs receiving funding, be managed in a manner that provides clear **accountability** of performance.

United Way supports indicator based decision-making. Indicators help to form a common language to **measure success** and help determine where we still need to "keep working." United Way encourages non- profits to use data (indicators aligned with performance measures) as a basis for making better decisions.

## **VI. INELIGIBILITY**

In the event an application is received and the program is deemed ineligible by committee or should the agency decide to pull the program before funding is allocated, no alternate may be submitted. Alternate program(s) can be submitted for consideration during the next funding cycle.

## **VII. GENERAL INFORMATION**

Grants will be disbursed incrementally, on or about the 25<sup>th</sup> of each month, beginning in January of the grant year.

Applicant must have audited financial reports from their most recent fiscal year and must be provided *when requested*. In some circumstances, reports from the organizations most recent quarter must be provided when requested.

No grants / allocations will be provided for sectarian religious groups/purposes, non-human services, art projects,

athletic teams, events, activities to which school credit is earned, political activities, building and land improvements, or to fund prior year deficits. St. Landry-Evangeline United Way does not grant start-up funds at this time.

The organization submitting the grant proposal must have a proven record of successfully serving the needs of the people of St. Landry or Evangeline Parishes.

Grants will be awarded on a one-year cycle.

It should not be presumed that any applicant will be awarded a grant on an annual basis, nor should the availability of these grants be considered an annual part of the applicant's budget.

The Community Investment Committee has the option, but neither the duty nor responsibility, to grant requests for more than one year in duration, provided funds are available in the subsequent year. Organizations may receive grants on an annual basis based on program outcomes.

Grant amounts will derive from campaign funds raised and available from United Way Grant / Allocations Fund for any given fiscal year. No awards will be made if funding is not available nor any grants are disbursed based on speculation of future funds.

Grants will be awarded based on Community Investment RFP Guidelines and geared toward meeting the identified community impact issues of St. Landry and Evangeline Parishes. Priority will be given to those organizations that can provide documentation from past initiatives that clearly demonstrate successful program outcomes, a program linked to a well-developed purpose, mission and action plan.

Organizations, as a provision of accepting grant monies, must provide Quarterly Grant Summary Reports to the Community Investment Committee demonstrating that the funds were used for their intended purpose.

#### **VIII - GENERAL INSTRUCTIONS**

The Board Chair and Executive Director's signatures are required in three (3) locations on the application: at the ends of Sections 1, 8 and 9. Verify that all appropriate blanks have been signed before submission of this application.

Only Sections 1 through 9, copy of most recent IRS 990 are to be submitted. The Guidelines and Instructions are to be retained in your files.

Six (6) copies (including the original) of the application must be received. Each set must be secured with a binder clip. **DO NOT** use staples, 3-ring binders or folders. All materials must be on standard 8 1/2 x 11 inch paper. **DO NOT** submit any materials other than those specifically requested at this time.

Original, signed applications are required at deadline. However, if an online application is available, it will be accepted requiring the same deadline. No faxes and/or emails will be accepted. Applications will be accepted at the St. Landry-Evangeline United Way office at 311 W. Vine, Opelousas, LA.

**APPLICATION DEADLINE IS 12:00 NOON, WEDNESDAY, AUGUST 31, 2017**



## 2018 GRANT APPLICATION FOR FUNDING

### SECTION 1 – ORGANIZATIONAL INFORMATION

ORGANIZATION'S NAME:

EIN NUMBER:

MAILING ADDRESS:

STREET ADDRESS:

CITY/STATE/ZIP:

OFFICE TELEPHONE #:

OFFICE FAX #:

WEB ADDRESS:

ORGANIZATION'S MISSION STATEMENT:

NAME OF INDIVIDUAL OVERSEEING THIS GRANT:

THIS INDIVIDUAL'S E-MAIL ADDRESS IS:

THIS INDIVIDUAL'S CELL PHONE NUMBER IS:

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### CERTIFYING OFFICIALS' STATEMENT

I acknowledge, by my signature below, that I am the duly appointed representative of the organization named above, applying for grant funding for calendar year 2015 from St. Landry-Evangeline United Way. I further acknowledge that I am authorized to certify and affirm all statements enclosed in this application.

\_\_\_\_\_  
Signature of Board President/Chairman

Typed/Printed Name

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

\_\_\_\_\_  
Signature of Executive Director

Typed/Printed Name

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

**SECTION 2 – PROGRAM INFORMATION**

The name of the PROGRAM for which this Application for Funding is being made:

Amount Requested for 2016 Funding:

What % of your Total Budget is this amount?  Was this PROGRAM funded last calendar year?  YES  NO

This PROGRAM serves this Impact Area:  EDUCATION  FINANCIAL STABILITY  HEALTH  BASIC NEEDS

Provide a brief summary of this PROGRAM:

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**DEMOGRAPHIC DATA**

How many St. Landry or Evangeline Parish residents received services through this PROGRAM during the last calendar year?

Who is the target population served by this PROGRAM?

How is eligibility determined?

How are outcomes/results measured?

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**QUALIFYING EXPENSES**

Exactly how will this Grant Money be used within the PROGRAM (specifically what and how will the money be spent)? (Example: "to purchase supportive learning materials as...", "to purchase non-perishable food stocks", "to purchase training supplies such as workbooks and registers for financial/budget preparation classes")

**COLLABORATIVE COMMUNITY EFFORTS**

List all other programs within the St. Landry or Evangeline Parish communities which your PROGRAM collaborates with during the course of the year.

Does this PROGRAM provide the same/similar services as any other program within the two Parishes? If so which, and how does this PROGRAM differ from that one?

**FINANCIAL OPERATIONS**

If this organization has any board/donor restricted funds being held, who restricted the funds and why?

If this organization plans to conduct local fundraisers during calendar year 2015, list when, type and anticipated profit.

**VOLUNTEER DATA**

If this PROGRAM works with children, seniors or other vulnerable clients, are police background checks required for your staff and/or volunteers before they are allowed interaction with these clients?       YES     NO

If NO, explain:

How many volunteers worked for this PROGRAM in the last calendar year?

How many volunteer hours were recorded by this PROGRAM in the last calendar year?



**SECTION 3 – FINANCIAL INFORMATION**

AGENCY NAME:  PROGRAM NAME:

**PART 1: FINANCIAL INFORMATION FOR THE ENTIRE AGENCY FOR FISCAL YEAR:**  **TO**   
**(PLEASE USE FIGURES FROM LAST COMPLETED FISCAL YEAR END)**

REVENUE	2017 BUDGET	2017 ACTUAL*	PROPOSED 2018 BUDGET
All Income (Other than Fundraising)			
Fundraising Income			
TOTAL REVENUE			
EXPENSES	2017 BUDGET	2017 ACTUAL*	PROPOSED 2018 BUDGET
Fundraising Expenses			
Insurance (all inclusive)			
Mortgage/Rent			
Office/Administrative Supplies			
Salaries, Benefits & Payroll Taxes			
Telephone & Utilities			
All Other Expenses			
TOTAL EXPENSES			

\*Estimated Actuals, if necessary

**PART 2: FINANCIAL INFORMATION FOR THE PROGRAM FOR FISCAL YEAR:**  **TO**   
**(PROGRAMS OPERATING IN MULTIPLE PARISHES MUST PROVIDE BUDGET INFORMATION FOR ST. LANDRY/EVANGELINE PARISH ONLY.)**

REVENUE	BUDGET	ACTUAL	PROPOSED 2018 BUDGET
St. Landry-Evangeline United Way			
Local/State/Federal/Private Grants			
Fundraising Income			
All Other Income			
TOTAL REVENUE			
EXPENSES	BUDGET	ACTUAL	PROPOSED 2018 BUDGET
Fundraising Expenses			
Mortgage/Rent			
Office/Administrative Supplies			
Program Supplies			
Conference & Training			
Salaries, Benefits & Payroll Taxes			
Taxes (all inclusive)			
Telephone & Utilities			
Travel			
All Other Expenses			
TOTAL EXPENSES			

**SECTION 4 – OUTCOME/RESULTS SUCCESS STORY  
(TO BE COMPLETED BY RENEWAL GRANT APPLICANTS ONLY)**

**AGENCY NAME:**  **PROGRAM NAME:**

Contact Person who could provide additional information, if needed:

Contact's Daytime Phone #:  Email:

**Choose one of the Program's outcomes/results that you want to illustrate in a success story. State this outcome below as you want it communicated to St. Landry-Evangeline United Way volunteers, as well as, the community at large.**

**Provide a success story based on the above outcome. The story should illustrate your program's effect on a single individual or family. Limit your response to the space provided.** This information will not only add a personal dimension to your funding Request, but it may be used as an input to the development of our community co-marketing.

**PLEASE ANSWER YES OR NO TO EACH OF THE FOLLOWING STATEMENTS AND COMPLETE THE BOXES WHERE SPECIFIC INFORMATION IS REQUIRED. PLEASE READ EACH STATEMENT CAREFULLY BEFORE ANSWERING.**

	YES	NO
I certify that the organization named in this application is a human health and welfare organization providing services, benefits, or assistance to, or conducting activities affecting human health and welfare.		
I certify that the organization named in the application accounts for its funds in accordance with generally accepted accounting principles.		
I certify that the organization named in the application prohibits the sale or lease of all contributor mailing lists.		
I certify that that the organization named in this application effectively uses all funds granted for announced purposes.		
I certify that the organization named in this application is chartered or incorporated under the State of Louisiana or another governmental entity.		
I certify that, as of the date of submission of this application, the organization named in this application does not knowingly employ individuals or contribute funds to organizations found on the following terrorist related lists promulgated by the U.S. Government, the United Nations, or the European Union. Presently these lists include the Department of Treasury's Office of Foreign Assets Control Specially Designated National List, the Department of Justice's Terrorist Exclusion List, and the list annexed the Executive Order 13224.		
I certify that the organization named in this application does not engage in lobbying nor does it attempt to influence voting or legislation at the local, State or Federal level.		
I certify that the organization named in this application has a presence in the geographic area covered by the local campaign. (Local presence is defined as a staffed facility, office or portion of a residence dedicated exclusively to that organization, program services available to members of the public seeking its services or benefits. The facility must be open at least 8 hours a week and have a telephone dedicated exclusively to the organization.)		
I certify that the Internal Revenue Service recognizes the organization named in this application as tax exempt under 25 U.S.C. 170 and can produce an IRS Tax Determination Letter if asked to do so.		
I certify that the organization's annual revenues for the most recently completed fiscal year are less than \$200,000, therefore no audit is required.		
I certify that this organization was audited in accordance with generally accepted auditing standards by an independent certified public account in the immediate preceding year. A copy of the most recent annual audit of this organization can and will be provided if asked to do so.  The most recent annual audit is dated: <input style="width: 150px; height: 20px;" type="text"/>		
I certify that this organization compiles regular financial statements and a copy of the most recent for the current year-to-date can and will be provided if asked to do so.		
I certify that the organization named in this application has filed an accurate IRS 990 form and a copy of the front page of this return is <b>ATTACHED</b> to this application.  The most recent IRS 990 Form is dated: <input style="width: 150px; height: 20px;" type="text"/>		
I certify that an active and responsible governing body directs the organization named in this application whose members have no material conflict of interest and who all serve without compensation. A copy of the Board of Directors Roster and minutes from the previous year is <b>ATTACHED</b> to this application.		
I certify that the organization named in this application conducts publicity and promotional activities based upon its actual program and operations, that these activities are truthful and non-deceptive, include all material facts, and make no exaggerated claims.		

**SECTION 5 – CERTIFICATIONS (CONTINUED)**

	YES	NO
As a <b>FIRST TIME</b> applicant, I certify that a copy of the Articles of Incorporation of this organization are included at the end of this application.		
As a renewal applicant, I certify that this organization’s Articles of Incorporation have previously been submitted to United Way.		
As a <b>FIRST TIME</b> applicant, I certify that a copy of the By Laws of this organization are included at the end of this application.		
As a renewal applicant, I certify that the By Laws of this organization have previously been submitted to United Way.		
As a renewal applicant, I certify that the By Laws of this organization are included at the end of this application <b>to reflect changes since the last submission.</b>		

**SECTION 6 – STANDARDS OF AFFILIATION**

For an organization to be eligible for affiliation with St. Landry-Evangeline United Way, it must meet all of the criteria below. The organization must remain in compliance with the criteria at all times. All agency affiliations are subject to final approval by the United Way Board of Directors.

	YES	NO
This organization is incorporated or chartered under federal and Louisiana state statutes.		
This organization is registered with the State of Louisiana’s Secretary of State’s office.		
This organization is recognized as exempt from federal income tax under IRS Section 501(c)3 Internal Revenue Code 1954, as amended, and as a publicity supported organization of the type described in Section 170(b)(1)(A)(vi).		
This organization is primarily involved in providing program(s) and services that are health, education or human service related and directly serve St. Landry and Evangeline Parish residents and employers.		
This organization has an independent governing body consisting of voting members who are citizen volunteers, preferably including at least one resident of St. Landry and Evangeline Parishes, that has the authority to decide policy and strategic direction with respect to the organization’s programs, administration and finances, in accordance with the organization’s By Laws who shall meet at least four times per year. Members of an independent governing body do not engage in transactions in which they may have material conflicting interests resulting from any relations and/or business affiliation. There are no paid voting members on the Board.		
This organization maintains a non-discrimination policy or plan that does not discriminate on the basis of race, color, creed, religion, general, national origin, age, marital status, sexual orientation, veteran status or status as a person with a disability.		
This organization has an annual audit performed by a certified public accountant in accordance with the Standards of Accounting and Financial Reporting for Voluntary Health and Welfare Organizations, and with the American Institute of Certified Public Accountants (AICPA) Standards. And, this organization adheres to AICPA accounting standards. (Organizations with an operating budget of less than \$200,000 may submit a financial compilation rather than an audit, subject to approval by United Way.)		
This organization demonstrates adequate understanding of community needs in St. Landry and/or Evangeline Parishes and services currently being provided.		

**SECTION 7 – GUIDELINES FOR USE OF THE UNITED WAY NAME AND LOGO**

United Way Worldwide (UWW) has authorized St. Landry-Evangeline United Way to issue guidelines for the usage of the trademarks **United Way** and the **Helping Hand Symbol**, under the terms and conditions set forth below:

This license is royalty-free, non-exclusive and for a Service Area not to exceed the Service Area assigned to the Agency licensing St. Landry-Evangeline United Way.

The Agency may use the Licensed Marks only in connection with its charitable fundraising and health, education or human services, and as more particularly may be described in the affiliation agreement.

The Agency may use the phrase “a United Way Agency” or “a United Way Affiliated Agency” or “a United Way Partner Agency” on the same terms and conditions as the Licensed Marks.

The Agency shall use its best efforts to comply with written policies, quality and graphics standards set forth in the Trademark Manual located at the United Way office.

The Agency shall at all times use such notices of registration with the Licensed Marks indicated in the Trademark Manual and shall display the licensed marks only in the format or format as specified therein.

All advertising, promotional matter and other printed or graphic material whether print media; television or radio, of the Agency bearing the Licensed Marks shall comply with the guidelines.

United Way shall have the right to reasonably verify the Agency’s compliance with the terms of this license.

The license hereby granted is personal to the Agency and shall not be assigned by the agency, directly or indirectly, without the written consent of either UWA or St. Landry-Evangeline United Way, nor shall the Agency have the right to grant any sublicense to use the Licensed Marks.

This license will remain in effect for a term not to exceed the duration of the Agency Affiliation Agreement with the St. Landry-Evangeline United Way. Upon termination of agreement, the Agency shall discontinue immediately all usage of the Licensed Marks.

	YES	NO
This organization will display the United Way Community Partner sign within its business/program office.		
This organization will use the United Way logo on its organization/program website.		
This organization will use the United Way logo on its organization/program general purpose brochure.		
This organization will use the United Way logo on its newsletters and/or Annual Report.		

### SECTION 8 – COUNTERTERRORISM COMPLIANCE

In compliance with the spirit and intent of the **USA PATRIOT Act** and other counterterrorism laws, the St. Landry-Evangeline United Way. (“SLEUW”) requests that each funded program (agency / organization) certify that it is compliant with the SLEUW and the United Way Worldwide (“UWW”) compliance program.

**ORGANIZATION’S NAME:**

Check the Appropriate Box to Indicate Compliance With Each of the Following:	Comply	Do Not Comply
This Organization is not on any federal terrorism “watch lists,” including the list in Executive Order 13224, the master list of specially designated nationals and blocked persons maintained by the Treasury Department, and the list of Foreign Terrorist Organizations maintained by the State Department.		
This Organization does not, will not and has not knowingly provided financial, technical, in-kind or other material support or resources* to any individual or entity that is a terrorist or terrorist organization, or that supports or funds terrorism.		
This Organization does not, will not and has not knowingly provided or collected funds or provided material support or resources with the intention that such funds or material support or resources be used to carry out acts of terrorism.		

This Organization does not, will not and has not knowingly provided financial or material support or resources to any entity that has knowingly concealed the source of funds used to carry out terrorism or to support Foreign Terrorist Organizations.		
This Organization does not re-grant to organizations, individuals, programs and/or projects outside of the United States of America without compliance with IRS guidelines.		
This Organization takes reasonable, affirmative steps to ensure that any funds or resources distributed or processed do not fund terrorism or terrorist organizations.		
This Organization takes reasonable steps to certify against fraud with respect to the provision of financial, technical, in-kind or other material support or resources to terrorists and terrorist organizations.		

\*In this form, "material support and resources" means currency or monetary instruments or financial securities, financial services, lodging, training, expert advice or assistance, safe houses, false documentation or identification, communications equipment, facilities, weapons, lethal substances, explosives, personnel, transportation, and other physical assets, except medicine or religious materials.

**CERTIFYING OFFICIALS' STATEMENT**

I certify on behalf of the organization listed above that the foregoing is true.

\_\_\_\_\_  
Signature of Board President/Chairman

Typed/Printed Name

Date

\_\_\_\_\_  
Signature of Executive Director

Typed/Printed Name

Date

**SECTION 9 – PARTNER AFFILIATION AGREEMENT BETWEEN ST. LANDRY-EVANGELINE UNITED WAY AND**

**I. PURPOSE**

This agreement outlines the affiliation relationship between St. Landry-Evangeline United Way (hereinafter referred to as "United Way") and the organization (hereinafter referred to as "Partner").

**II. AFFILIATION**

This agreement constitutes acceptance of the collaborative relationship between United Way and the Partner, but is not contingent on United Way funding. This affiliation agreement in no manner creates a partnership or joint venture between Parties.

**III. REQUIREMENTS**

**United Way agrees:**

- A. to address the focus areas identified by the Community Impact Initiative;
- B. to approach community solutions by solving problems focusing on the root causes in the key action areas as outlined by the Community Impact Initiative;
- C. to address critical needs and improve the quality of life throughout St. Landry and Evangeline Parishes by inspiring and uniting residents;

- D. to be proactive in addressing unmet human service critical needs and in addressing ways of prevention of social problems;
- E. to be proactive in addressing community issues by establishing priorities, seeking solutions, assisting in the solution process, fostering collaborative cooperation and coordination and focusing efforts on priority needs and target populations;
- F. to provide a variety of supportive services aimed at increasing the capacity of the social service system to respond to community needs;
- G. to assume the responsibility for an annual community-wide fund raising campaign in support of the community focus issues and selected approved program(s);
- H. to maintain stewardship on behalf of United Way donors;
- I. to recognize and respect the autonomy of every organization, through its governing board to determine its own policies and to manage its own program(s);

**Participating Affiliated Organization agrees**

- A. to remain in compliance with all applicable United Way Standards of Affiliation in the performance of its services and obligations;
- B. to remain in compliance with the spirit and intent of the U.S. Patriot Act and other counterterrorism laws
- C. to cooperate actively in the community endeavors in identifying and addressing issues that impact our community;
- D. to cooperate actively with United Way in advancing the cause of the Community Impact Initiative by initiating collaborations which reduce duplication of program services and strengthen existing services
- E. to submit required documentation by established deadlines; on an annual or quarterly basis, provide the following documentation: independent audit report with management letter (within 6 months of fiscal year end), if required by the United Way (see Attachment A for requirements), IRS Form 990 with all schedules, Quarterly Spending and Program Outcomes monitoring reports, report of other funding from other funding organizations, a list of the agency's current Board of Directors (if applicable);
- F. to participate, if possible in the United Way Annual Campaign by assisting in campaign presentations
- G. Partner will not conduct payroll deduction fundraising campaigns at any time of the year the Partner will not affiliate with any fundraising campaign that operates in competition with United Way. The Partner will notify United Way in advance of any plans to conduct a capital campaign;
- I. to immediately notify United Way regarding any legal, financial or organizational matters or changes which may affect the Partner's ability to operate and/or deliver program services;
- J. to recognize and respect United Way's responsibility to modify priority funding patterns in response to changing community needs in order to maximize benefits in the community;
- K. to identify itself to community, clients and friends as "A United Way Partner"; the agency shall protect the United Way brand and recognize that United Way has the right and obligation to protect the United Way trademark; the agency must adhere to United Way standards on proper use of the United Way name and logo; United Way encourages the Partner to use the United Way brand in conjunction with its logo on stationary, advertising and promotional materials and special events; for more information and guidelines on the usage of the United Way logo with the licensed trademark, contact United Way at 337-942-7815;

**V. PARTNER NON-COMPLIANCE**

In the event of any Partner non-compliance with United Way's policies, the Administrative Staff of United Way will review the situation for appropriate action. Actions may include (but are not limited to) recommendation to the Board for the suspension of allocation payments or other membership privileges. The United Way Board must approve these actions. United Way Staff will be charged with ensuring that Partners remain informed about United Way policies so that compliance can be facilitated.

**VI. TERMINATION OF CONTRACT OR ALLOCATIONS, AND REIMBURSEMENT**

United Way reserves the right to cancel this agreement upon written notice with or without cause. United Way can require reimbursement of allocations awarded while Partner was not in compliance with agreement.

- A. Mutual Termination. The parties may terminate this agreement upon mutual agreement by setting forth, in writing, the effective date and procedures for termination.

- B. Termination of Agreement by the Partner. The Partner (by written notification setting forth the reasons and specifying the effective date, which date shall be no sooner than 30 days after the Partner's written notice) may terminate this agreement for good cause. Good cause may include circumstances beyond the control of the Partner.
- C. Payment to the Partner. In the event of termination, the Partner shall no longer receive allocations.
- D. Suspension of Allocation Payments. United Way can delay, suspend or terminate payments until required reporting is submitted; if Partner program has discontinued, or Partner Organization has not maintained non-profit status, or has breached the agreement.
- E. Reimbursement of Allocation Payments. United Way can require partial or full reimbursement of allocations for non-compliance of agreement.

**VII. DURATION OF AGREEMENT**

Unless terminated or otherwise modified, this agreement shall be effective January 1, 2017 to December 31, 2017.

**VIII. ACKNOWLEDGEMENT AND ACCEPTANCE**

\_\_\_\_\_  
Signature of Partner Board President/Chairman

Typed/Printed Name of Board President/Chairman

\_\_\_\_\_  
Signature of Partner Executive Director

Typed/Printed Name Partner Executive Director

Date

\_\_\_\_\_  
Signature of UW Board President

Typed/Printed Name UW Board President

\_\_\_\_\_  
Signature of UW Executive Director

Virginia LeCompte

Typed/Printed Name UW Executive Director

Date