

United for good.

Memorandum of Understanding United Way of the Wine Country and County of Sonoma

The County of Sonoma and United Way of the Wine Country (United Way) agree as follows:

Pursuant to County of Sonoma's Employee Fund Drive Policy, United Way of the Wine Country will be the Principal Combined Fund Drive Agency (PCFDA).

PCFDA Name: United Way of the Wine Country
Contact Person: Lisa Carreño, President/CEO
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This plan for the **2023/2024 Combined Fund Drive** is to establish payroll deductions and other donation types from the salaries/wages of County of Sonoma officers and employees and County of Sonoma Retired Employees for the period beginning January 1, 2023, through December 31, 2024.

United Way further agrees as follows:

1. To conduct an annual fundraising campaign with the goal of representing all federations equally.
2. That the percentage of fundraising and administrative costs to be charged in the 2023/2024 Combined Fund Drive by United Way to affiliated and nonaffiliated organizations is 10%.
3. To include the following statement on the paper pledge form and electronic pledging: "If paying by check, please make your check payable to County of Sonoma Employee Combined Fund Drive".
4. To pay out to all Agencies and Federations and coordinate their participation in the Combined Fund Drive campaign.
5. Agency/federation distributions will occur as follows:
 - a. Designations made to agencies are sent in addition to any existing program funding provided by United Way.
 - b. United Way does not pay the designated agency until the donor's pledge payment is received by United Way.
 - c. Once United Way receives payments on pledges to a designated agency, United Way pays the designated agency semi-annually (i.e., December 2024 and June 2025).
 - d. Donor names and gift details are forwarded to designated agencies unless the donor chooses to remain anonymous.



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6. The boundary of the area where this federation normally solicits public contributions is Sonoma, Mendocino, Lake, Humboldt, and Del Norte counties.
7. United Way hereby certifies under penalty of perjury that its organization is in compliance with the provisions of the Fair Employment Practice Act, Part 4.5 (commencing with Section 1410) of Division 2 of the Labor Code.
8. To solicit contributions for the Combined Fund Drive and to not make public or distribute donor information.
9. To provide an electronic version of a nonprofit agency/federation guide and/or an online searchable link (i.e., GuideStar) for donors to make designation decisions upon request.
10. To provide other campaign materials to be disbursed to County Employee Campaign Leaders and employees during the fund drive as needed.
11. To provide an electronic pledging website on which the County of Sonoma officers and employees may designate contributions to federations and nonprofit agencies.
12. To provide a printable electronic copy of a form on which County of Sonoma employees/retirees without access to the internet can designate contributions to federations and nonprofit agencies. Such form will be provided in PDF and distributed to the County of Sonoma Campaign Committee to be posted on the employee intranet site in order to be accessed by County Employee Campaign Leaders. We recommend three copies of the completed form be made and distributed to the following parties for accounting purposes: Payroll Department for County of Sonoma or County of Sonoma Retired Employees, the PCFDA (United Way), and the donor/employee.
13. To provide County representatives with full Combined Fund Drive financial reports (electronic or paper) within 60 days of close of campaign, including details of employee designations upon request.
14. To distribute payroll deductions to write-in designations made by employees upon United Way's verification of designated agency. In the case of designations made to a write-in or non-federated agency, the agency is eligible for donations if it is tax-exempt according to IRS Code 501(c)3. United Way may request agencies to provide proof of their 501(c)3 status before sending any payments to the agency. In the event an agency does not respond or does not meet eligibility, United Way will attempt to contact the donor directly to identify an alternative agency choice.

The County of Sonoma further agrees as follows:

1. To cooperate with enhancements to be environmentally conscious by operating an electronic pledge (i.e., paperless) campaign.
2. To provide an electronic file of County of Sonoma employees to United Way for online pledging to include Employee's ID/unique identifier, employee name, email, and department information.
3. To send all Combined Fund Drive email communications to employees through the County of Sonoma's internal communication platform.
4. To provide an electronic file to United Way accompanying each payroll check disbursement to include Employee's ID/unique identifier, employee name, and donation/payment amount. Payroll Departments for County of Sonoma and County of

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Sonoma Retired Employees will email the electronic file to United Way beginning with the first 2023 payment.

5. To send all payroll deductions for all agencies and federations to United Way.
6. To comply with pledge instructions on electronic and paper pledge methods. In the event of a Federation default, reallocation decisions will be made by the County Campaign Chairs.
7. To limit designated contributions for payroll deductions to a maximum of five (5) designations per donor via electronic and paper pledging.
8. To promote online electronic pledging tool awareness throughout the campaign using email, other messaging/communication, and Department Head communications.

By executing this MOU, each signatory represents they have the authority on the date of execution to execute this MOU on behalf of their respective governing bodies. At least two copies of this MOU shall be signed and exchanged by the parties, and each shall be considered an original document.

County of Sonoma Representative (Print Name & Title)

County of Sonoma Representative (Signature & Date)

Lisa Carreño, President/CEO, United Way of the Wine County

United Way of the Wine Country Representative (Print Name & Title)



2/7/2024

Lisa Carreño, President/CEO, United Way of the Wine Country (Signature & Date)