MEMORANDUM OF UNDERSTANDING
BETWEEN
CATHOLIC CHARITIES OF NORTHWEST FLORIDA, INC. and
UNIVERSITY OF WEST FLORIDA BOARD OF TRUSTEES

This Memorandum of Understanding, made this 9th day of June, 2008, shall be in effect from October 1, 2008 to September 30, 2013 or until terminated by either party under the provisions of Article III between Catholic Charities of Northwest Florida, Inc. (hereinafter referred to as “Catholic Charities”), the AFI Project Agency, and University of West Florida, for and on behalf of the University of West Florida Board of Trustees (the “University”).

PURPOSE: The purpose of this MOU is to enable Catholic Charities and its partner agencies to successfully implement an assets-based approach known as Assets for Independence (“AFI”) for giving low-income families a hand up out of poverty. AFI projects help participants save earned income in special purpose, matched saving accounts called Individual Development Accounts (“IDAs”). AFI project families use their IDA savings to overcome barriers to improved financial security and to achieve certain objectives, primarily acquiring a first home, capitalizing a small business or enrolling in postsecondary education.

WHEREAS, Catholic Charities) is a not-for-profit corporation engaged in, among other things, the provision of health and human services; and serves as the AFI Project Agency in its applications to the federal government and other local, state or national funding institutions, and

WHEREAS, Catholic Charities serves as the “Lead Agency” for the Escambia County’s Poverty Solutions Team implementation of “Bridges to Circles” (“Bridges”) initiative, including the AFI project, with the goal of cutting poverty in half by 2020, and

WHEREAS, the University as part of the State University System of Florida, is the only regional comprehensive public university in the region and whose primary goal is to inspire and achieve the highest levels of student learning, creativity, and success and encourage the development of individual potential in students, faculty, and staff, and

WHEREAS, the University has been an active partner on the Poverty Solutions Team, and in particular, chairing the Education Committee, and is committed to the goal of cutting poverty in half by 2020, and

WHEREAS, Catholic Charities and the University recognize that there are certain advantages to be gained from collaborating on projects such as the Bridges initiative and AFI project; and wish to set forth a framework for a working collaboration between the two organizations.

NOW, THEREFORE, the parties hereto agree as follows:

I. Under this agreement, the University agrees to the following:
1. **REFERRALS**- To work with Bridges staff to identify and refer eligible and appropriate clients to Catholic Charities for enrollment into the Bridges initiative and the AFI project.

2. **ADMISSIONS & FINANCIAL AID**- To identify a lead staff person to work directly with Bridges staff at Catholic Charities to assist Bridges initiative and AFI project enrollees in the admissions and financial aid processes. This includes assisting with the maximization of all eligible financial aid prior to the use of IDA funds.

3. **STUDENT SERVICES**- To identify a lead staff person from the office of Student Affairs to work directly with Bridges staff at Catholic Charities to assist Bridges initiative and AFI project enrollees in transitioning to university life and maintaining a successful academic career through the provision of support and counseling as deemed appropriate.

4. **EDUCATION & TRAINING**- To develop and/or secure appropriate poverty curriculum, workshops and in-service opportunities, in partnership with the Education Committee of the Poverty Solutions Team, for ongoing poverty education efforts with businesses, human service agencies, government, faith community and other community sectors. This includes an inventory of existing training, research and services and the identification of barriers to accessing post secondary education by those in poverty.

5. **EVALUATION**- To assist Catholic Charities in the evaluation of the Bridges initiative and the AFI project as defined in Bridges and/or AFI grants and/or contracts. This includes providing Catholic Charities with participant and/or program data and statistics as appropriate; providing that University shall at all times protect the privacy of its students as required by state and federal law. (This may lead to a more formative evaluation role for the University in the future, should the need arise and funding become available.)

II. **Under this agreement, Catholic Charities agrees to the following:**

1. **CIRCLES LEAD AGENCY**- As the Circles to Bridges Lead Agency Catholic Charities agrees to provide overall leadership, management and staffing to the initiative. This includes providing a minimum of two case management staff positions to manage recruitment, assessment, eligibility determination, case planning, goal development, counseling, IDA account management, training and other identified service needs of enrolled clients.

2. **AFI PROJECT AGENCY**- As the AFI Project Agency Catholic Charities agrees to administer all AFI grant awards and contracts to successfully implement the Bridges initiative and the AFI Project. This includes all services identified in the preceding paragraph above, and additionally to include all grant compliance, monitoring and reporting as defined in grant and contract agreements. Catholic Charities is responsible for managing IDA accounts, in partnership with identified financial institution and in compliance with all grant guidelines and regulations.

3. **EVALUATION**- To facilitate and manage the evaluation of the Bridges initiative and
the AFI project per grant and/or contract guidelines and regulations.

4. **MARKETING** - To ensure that all Bridges initiative and AFI project partners are fairly recognized and represented in all communication and marketing materials.

5. **MAINTENANCE OF RECORDS** – To work with the University to protect the privacy of University students as required by state and federal law while maintaining and making available such information as may constitute public record under Florida law.

**III. Modification and Termination**

This is a voluntary agreement between Catholic Charities and UWF. Either party may propose amendments modifying this agreement at any time. Before any amendment will become effective, both parties must agree in writing to the modification. The effective date of any amendments will be the date agreed upon and specified in the agreement or if no date is specified, the last date upon which representative liaisons of the parties have agreed in writing to the amendment.

Either party, without penalties or liability to either party can terminate this agreement, by providing 90 days written notification to the other party. Provided, however, that should any University clients be enrolled in Bridges initiatives or AFI projects at the time of notification of termination, all clients, at their discretion, shall be permitted to progress through completion of the programs.

**IV. Notice and Contact**

A. The name, address, and telephone number of the contact for the University is:
   Dr. Fernaudra Ferguson, Assistant to the Dean
   Student Success Programs
   University of West Florida
   11000 University Parkway
   Pensacola, FL 32514
   (850) 474-2713

B. The name, address, and telephone number of the contact for Catholic Charities is:
   Mark Dufva, Executive Director
   Catholic Charities of Northwest Florida, Inc.
   1000 W. Garden St.
   Pensacola, FL 32502
   (850) 435-3518
V. IN WITNESS WHEREOF, the parties hereto have caused their duly authorized corporate officers to execute this MEMORANDUM OF UNDERSTANDING this 19th day of June, 2008.

CATHOLIC CHARITIES OF NORTHWEST FLORIDA, INC.

BY: [Signature]
    Executive Director

UNIVERSITY OF WEST FLORIDA

By: [Signature]
    PROVOST

APPROVED AS TO FORM AND LEGALITY:

[UWF ATTORNEY]