Funding Agreement

Between

The United Way of Muskingum, Perry, and Morgan Counties

And

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Agency-Herein after referred to as the Funding Partner)

It is our belief that the United Way and the Funded Partners share a common vision and a common goal – to provide a private, non-profit service network to help people in Muskingum, Perry, and Morgan Counties. We recognize that this partnership requires a two-way avenue of support and implies a high level of trust between the partners. We recognize that both United Way as well as the funded partners require a level of mutual independence as well as a high level of cooperation. The partners and United Way need one another, and the community needs both.

While the United Way staff and Board continue to see the annual campaign as a vital focus and area of responsibility, the United Way must continue to strengthen its community role in areas of planning, community leadership on critical issues, and the exploration of alternative sources of funds. It is our goal that program initiatives will be of long-term value to the community. It is our hope that the positive impact of these initiatives will translate into growth of the campaign, benefiting our funded partners. It is the intent of United Way to provide funding, which improves the quality of life in our community, and, when gaps exist, provide staff/funding on a systemic level, which reaches people beyond traditional programs.

The United Way is accountable to many groups, as are the participating funded partners. Among those groups are our investors. While we believe that unrestricted campaign contributions give us the most leverage to help the most people within our community, we also recognize that many investors may wish to designate their annual contribution or a portion of their contribution to a specific funded partner. They may do this by writing in their designation to a specific partner on the United Way pledge card during the annual campaign. The United Way of Muskingum, Perry and Morgan Counties will continue to respect the wishes of those investors to both United Way as well as non-United Way partners. We do not intend to promote designation, nor will we discourage it. Effective January 25, 2018, ALL designations are assessed a 10% administration fee, at the time the designation is collected. Any agencies receiving designations must be a tax-exempt, health and human services organization, within the State of Ohio. Contributions must be a minimum of $100 for the designation to be forwarded. We will forward a list of designated gifts to each designated organization, as soon as possible, after receipt of the pledge. The partner is required to acknowledge each investor that designates by name in their annual report. The investment requests turned into United Way by the funded partners will be funded from the remaining pool of undesignated dollars. If the United Way system is to continue to improve quality of life, it is imperative that partners support a unified campaign and not encourage designations among their staff and volunteers. The continued partnership and affiliation are dependent upon the trust between United Way and the partners for the overall success of the campaign.

The United Way recognizes that it is not able to meet all partner requests through the annual campaign. We understand that partners need to conduct fund raising campaigns and programs outside of the United Way Campaign. It is important that partner boards actively support the United Way campaign and creatively raise their additional funds without diminishing the integrity of the United Way’s annual campaign. It is possible for both types of fund raising to compliment rather than compete with each other. In order to prevent interference with the annual campaign, funding partners agree that they may never engage in any type of payroll deduction campaign. Additionally, the agencies may not conduct any direct solicitation fund raising campaigns between September 1 and October 31 (known as the “black-out” period).

Examples of direct solicitation are mailings, phone calls, face-to-face asks and the solicitation of pledges for general operations including press coverage. During the blackout period, funding partners may engage in specific types of fundraising activities such as product sales or events with prior notice and consent. Failure to comply with these guidelines will jeopardize United Way investment.

If an alleged violation of a term of the agreement by a partner is reported, the United Way shall determine if in fact a violation has occurred. If so determined, the Executive Director and the Board President of the funding partner shall be notified immediately with a written directive to be in compliance, or to appeal the directive. The funding partner shall correct the violation or develop a plan of correction. If the violation is not corrected and agreed upon, the Board of Directors of the United Way may, at their discretion, terminate further funding of the partner. If a Plan of Correction is not established, the partner may enter Watch Status. The Board will notify the Agency within ten (10) working days of their decision.

All fund-raising activities within a capital campaign will be treated as separate from normal fund-raising activities. Partners should notify the United Way as soon as possible if they intend to conduct a capital campaign.

If United Way and the partners can fulfill the mission of helping one another and continue to work together to provide needed quality programs that improve the long-term health of our community, we believe that the community will respond, and the campaign will continue to grow. We are stronger together than we are as independent entities, and it is to our collective benefit that we present ourselves as a unified body with distinct missions that support the overall mission of the United Way.

The Board of Directors of the United Way of Muskingum, Perry and Morgan Countries and Board of Directors of this partner agree to the principles outlined on the following pages.

**Responsibilities of United Way**

1. United Way will conduct an annual campaign. Community volunteers will assist the United Way Board in evaluating Partner requests for funding. The undesignated funds (after expenses and a withholding for uncollectable pledges) will be invested in funding applicants by the United Way Board.
2. United Way will promote the services and programs of partners as a viable way to meet the needs of the community.
3. United Way will seek information from partners on community conditions and best program practices.
4. United Way will make copies of its board minutes available to partners upon request.
5. United Way is committed to minimizing administrative expenses, and when possible, to fund these necessary items from non-campaign revenue.
6. United Way will respect the partners’ right to determine their own missions and to develop programs that fulfill those missions, with the understanding that there must be compatibility of missions as it relates to the other partners and the overall mission of United Way.

**Responsibilities of Funded Partner**

1. A fund partner will submit an annual application for undesignated investment funds. The application will include, but is not limited to:

* Information on the mission and history of the partner
* Description of United Way funded program
* Information on governance of the organization
* Annual partner budget
* Pages 1, 9, and 10 of the organization’s most recent 990, even if organization does not submit the 990 to the IRS. (Most recent financial information must be made available to United Way at any time, upon request, with appropriate notice.)
* State Evaluation or Certification, if applicable
* Patriot Act Compliance Form
* Signed Funding Agreement will be submitted with application for funding.
* Signed Code of Ethics Compliance Form

1. A funded partner will provide regular status reports including progress on goals and client outcomes identified in the application and proactively notify United Way to discuss program revisions as they occur. The status reports will include 2 impact stories with photos of clients that benefited from the United Way funded program.
2. A funded partner will not cite verbally or in writing a reduction in funding from United Way as justification for fund raising.
3. A funded partner will make copies of board minutes available upon request to United Way.
4. A funded partner will acknowledge and thank all donors who designate to their agency. Partner will send individual acknowledgements to donors who designated directly to them.
5. United Way wants to inform the public of its role in supporting the funded partner. United Way requires an acknowledgement of this support in the following manner, including, but not limited to press releases, flyers, posters, printed brochures, exhibits, videos, electronic publications, website, or other materials. Partner is required to e-mail copies of any and all samples to the Community Impact Director.
   1. Graphics: Graphic should include United Way name and logo.
   2. Public event: At any public event, you must acknowledge United Way support during the program.
   3. Text: Text should include the following statement: “This program is made possible, in part, by the United Way of Muskingum, Perry and Morgan Counties.”
6. A funded partner must be represented at the following United Way events: Campaign Kick-off and the Annual Celebration Event. In addition, partners are strongly encouraged to participate in Community Impact strategy meetings, campaign events and campaign presentations.
7. A funded partner will remain a tax-exempt organization at all times while funded by United Way.
8. A funded partner will take an active role in the campaign and will have its annual United Way campaign completed by September 1 of the campaign year. We expect the support of the funded partner’s board as well as the staff.
9. A funded partner agrees to not engage in payroll deduction campaigns with outside employers to raise funds for its agency.
10. A funded partner may not conduct any direct solicitation fund raising campaigns between September 1 and October 31 (known as the “black-out” period). Examples of direct solicitation are mailings, phone calls, face-to-face asks and the solicitation of pledges for general operations including press coverage. During the blackout period, funded partners may engage in specific types of fundraising activities such as product sales or events with prior consent.
11. A funded partner will provide expense receipts and invoices, upon request by United Way, to support their status report budgets.

This agreement for the fiscal year of 7/1/2023 to 6/30/2024 has been reviewed and accepted by the Executive Committee or the Board of Trustees of\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on \_\_/\_\_/\_\_. (Funding partner name)

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Funded partner Director Signature Funded Partner Board President

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Date Date

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Executive Director of The United Way of Board President, United Way of

Muskingum, Perry and Morgan Counties Muskingum, Morgan, and Perry Counties

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Date Date

Revised and approved by the United Way Board of Directors on January 26, 2018.