

UNITED WAY OF MARQUETTE COUNTY

2021/22 Campaign

PARTNER AGENCY AGREEMENT

Agency Name: _____

United Way's community investment goal is to fund specific and definable community impact areas linked to identified needs in the community. Programs should be sustainable over time. Agencies providing services shall be accountable to the community through their evaluation and reporting to United Way of Marquette County.

Program services not appropriate for United Way funding:

- A service which is primarily formal education, public relations, concerned with the arts, religious, political, or any issue identified by the United Way of Marquette County as controversial in nature.
- A service which does not directly benefit or directly enhance human service related programs.

Agencies will be excluded from admission if their admission would jeopardize the fundraising capability of United Way of Marquette County for its **Partner Agencies**.

Non-profit, 501 (c) 3 tax exempt organizations that provide human services in Marquette County may become **Partner Agencies** and apply for program funding from United Way of Marquette County's campaign by submitting an application and being approved as a **Partner Agency**. Only 501 (c) 3 health and human service organizations that provide services in Marquette County are eligible for **Partner Agency** admission to the campaign.

I. The Agency certifies the following:

- A. Has satisfactorily completed an agency application providing the documentation required, including:
 1. Documentation of tax-exempt status & financials.
 2. Current list of Board of Directors & meeting schedule (minimum quarterly mtgs).
 3. Certification that agency has minimum of 1 paid staff as point of contact for UW staff.
 4. Certification that the organization's fund-raising and administrative costs do not exceed 25% of its total revenue.
 5. Current license from the State Attorney General to solicit charitable contributions or documentation of exemption from same.
 6. Documentation of policy of nondiscrimination in employment and provision of services.
 7. Certification and documentation that the funded activities are not for political, fund-raising or religious purposes.
 8. Certification and documentation detailing the nature and level of health or human service that the organization provides as direct service to the residents of Marquette County.
 9. Completion of a program evaluation for the program that received funding during the previous campaign year.
 10. Completion of the 2-1-1 Questionnaire (if not already on file w/UPCAP).
 11. If funded, a brief story (that can be told in 30 seconds) of how a client or family was served by the United Way of Marquette County funded program, along with a minimum of 8 photos of the program in action.
 12. Listing of Fundraising Events and Endeavors.
- B. Abide by United Way of Marquette County's designation policy which stipulates:
 1. **Partner Agencies** may not actively promote designations on their behalf through the United Way campaign.
 2. **Partner Agencies** receiving donor-designated gifts will acknowledge the donors and indicate the gifts were received through the community campaign conducted by United Way of Marquette County.
 3. Names and addresses of donors provided to **Partner Agencies** will be used only by the designated organization and protected from any subsequent distribution or sale.

- C. Partner agencies are required to contribute to the annual United Way campaign, participate in campaign-related activities such as the kick-off event, campaign celebration, the annual Partner agency meeting and the Community Investment panel presentations if applying for funding. Agencies will provide volunteers to participate in the campaign kick-off event.
- D. Include the United Way approved logo, and the 2-1-1 logo on all published materials. Also add United Way link on website (if applicable). Acknowledge being a United Way **Partner Agency** in all press releases (printed and spoken).
- E. Maintain a 90% or greater level of compliance with the above requirements (3 yr. rolling avg.)

II. United Way of Marquette County certifies the following:

- A. Conduct an annual campaign, primarily to be conducted from September 1st to December 31st.
- B. List all **Partner Agencies** on website and marketing materials when applicable.
- C. Distribute program funding community investments and donor designations in accordance with policy and payment schedule policy.
- D. Administer a process by which **Partner Agencies** can apply for program funding in accordance with the community investment policy. **United Way of Marquette County Partnership does not guarantee funding.**
- E. Provide information to the general public about United Way of Marquette County's financial support of **Partner Agencies'** programs and donor directed designations.
- F. Conduct site visits to evaluate United Way funded programs.
- G. Appoint a United Way Board Member as an Agency Liaison for the year.

III. General Provisions:

- A. Receipt of either program funding or donor designations is contingent upon signing this agreement. **Failure to comply with the provisions of this agreement may subject a Partner Agency to termination of its status by action of the United Way of Marquette County Board of Directors. Any agency whose status is so terminated may forfeit all claims to any portion of its scheduled program community investment for that year not already disbursed by action of the United Way of Marquette County Board of Directors.**
- B. **Partner Agency** agrees to indemnify and hold harmless United Way of Marquette County at all times against and with respect to any loss, damage, claims, expenses (including actual attorney's fees), obligation and liability to any person whatsoever, which arise as a result or related to any activities of the **Partner Agency**. If any liability or claim is asserted against United Way of Marquette County in which the foregoing right of indemnity applies, the defense of such matter shall be the responsibility of the **Partner Agency** at its expense. Any agreement or outcome that would affect the rights or interest of United Way of Marquette County requires prior written approval of United Way of Marquette County.

PARTNER AGENCY SIGNATURES		UWMC SIGNATURES	
PRESIDENT/or Authorized Board Member	DATE	PRESIDENT	DATE
EXECUTIVE DIRECTOR	DATE	EXECUTIVE DIRECTOR	DATE

Please attach this *Partner Agency Agreement* with the requested agency signatures by Monday, January 18, 2021