



LIVE UNITED

UNITED WAY OF MARION COUNTY 2018 SUPPLEMENTAL FUND RAISING AGREEMENT

United Way of Marion County is an autonomous organization that is not bound by agreements that partner agencies or their national organizations have with United Way of America or any other United Way. The relationship of United Way to its agencies is defined in this agreement.

DEFINITION: Supplemental fund raising is defined as any effort on the part of an agency or group affiliated with a United Way agency to supplement its income by means of securing funds from the public.

PHILOSOPHY: The United Way of Marion County is joined by its partner agencies in expressing a solid commitment to the concept of a united community-wide fund raising effort. This policy has the dual purpose of reinforcing our support for the highly efficient annual United Way campaign, while providing a mutually supportive framework within which supplemental funds may be efficiently raised from the community to better meet present and future needs.

Agencies are encouraged to seek supplemental operating revenues from such sources as foundation and government grants, endowments, fees for services, membership programs and special events.

United Way supports agency supplemental fund raising provided it is conducted in an ethical and responsible manner within specified guidelines. United Way's prime concern is that agency supplemental fund raising projects do not hinder the annual campaign or infringe on funds which are designated through or normally given to United Way.

United Way is vitally interested in working with member agencies and the community at large to secure maximum funds to support the community's human service programs. Agencies are expected to be considerate of one another in coordinating their fund raising activities so that all agencies have a fair opportunity to develop self-support programs.

When using supplemental fund raising materials, agencies shall include the following statement:

"We (or insert agency name) is/are a United Way affiliated agency and has/have benefited from your United Way pledges.

OPERATIONAL FUND RAISING

Marion County United Way requires partner agencies and related auxiliary “support groups” to supplement operating funds in a manner that does not conflict with United Way fund raising efforts. Each agency is required to submit a projected list of supplemental fund raising activities in the annual funding application. United Way should be notified of any changes or additions to the projected list.

The following areas have no qualifications. Agencies are encouraged to consider these activities:

1. Community investments from other United Ways
2. Government grants and trusts
3. Non-corporate foundations and trusts
4. Investment and interest income
5. Bequests and endowments
6. Earned income from programs and contract services
7. Sales of program-related supplies and materials
8. Unsolicited gifts

The following activities are not permitted:

1. Solicitation of individuals within Marion County during the United Way campaign period of September 8 to November 8
2. Solicitation of businesses, corporations, or corporate foundations within Marion County or headquarter of organizations conducting business in Marion County during the United Way campaign period of September 8 to November 8
3. Special events held during the United Way campaign period of September 8 to November 8
4. In-company employee group solicitation at any time, except for an agency’s own employees

Other: During the United Way campaign period of September 8 to November 8 agencies may offer “value for your money” products for sale at non-agency-sponsored public events such as the Marion Popcorn Festival.

MEMBERSHIP DRIVES

Participating memberships providing dues or payments in return for use of physical or service facilities and equipment are encouraged, as are adequate membership fees to cover program costs. Membership appeals which serve the sole purpose of fund raising or creating a foundation for future fund raising activities are prohibited during the United Way campaign period of September 8 to November 8.

EMERGENCY APPEALS

The United Way of Marion County will consider granting permission for an agency to make an emergency appeal for funds to the community at any time of the year and of any size, depending on the nature and scope of the crisis. The content and scope of the

written appeal must be provided prior to consideration and approval of the United Way Executive Committee.

CAPITAL FUND RAISING

A capital fund raising drive shall be defined as a drive solely for the purpose of new construction, renovation of an existing structure, or the purchase of real estate or major equipment.

Although Marion County United Way believes it is the role of each agency’s board to determine the need for such drives, United Way requires that all pertinent information concerning capital fund raising be submitted to the Community Investment Committee and reviewed by the United Way Board of Trustees. This information will include the purpose, campaign goal, procedures and timing of the proposed drive, as well as the projected impact on future operating expenses.

Capital campaigns shall not be conducted during the United Way campaign period of September 8 to November 8. This includes advance publicity and follow-up activities, as well as active solicitation.

If Marion County United Way believes timing conflicts may exist between agencies in conducting their capital campaigns, United Way shall encourage the agencies to consult with each other to develop plans which are in the best interest of all involved.

DISPUTE RESOLUTION

This partner agency’s agreement with the United Way states that fund raising events will be conducted in accordance with United Way of Marion County policies.

1. Violations – In the event of an alleged violation, a conference will be set up with the United Way and agency officials in order to obtain information.
2. Penalties - If the United Way determines that a violation has occurred, sanctions may be imposed, which include but are not limited to a letter of retraction; a reduction or withholding of the agency’s allocation; and/or disaffiliation from the United Way. Any sanction imposed shall be approved by the United Way Executive Committee and subject to appeal through the Board of Trustees, whose decision shall be final.

Name of agency

Name of authorized agency representative Date

These policies will be reviewed and signed annually by all member agencies’ boards and staff. This document must be returned to United Way in order to receive funding. The United Way Board of Trustees or its assigned committee will review this policy, as needed.