



Partner Agency Participation Agreement
Between
The United Way of Morgan County Colorado and

Referred to hereinafter as the Participating Agency

Section I:

Both United Way and Participant agree:

1. To maintain responsible management through a representative governing board which serves without pay and which meets regularly to assure effective financial, service and administrative control in accordance with general standards set for all participating agencies by United Way.
2. To cooperate with each other in eliminating duplication of effort, improving efficiency of administration, promoting the annual United Way drive and interpreting Participant's service to the community in such manner as to identify Participant's affiliation with United Way.
3. To keep one another informed on all matters of common concern.

4. To provide each other with copies of the board of director's roster and, on request, the by-laws/constitution. Identify and report significant program or financial changes during the year.
5. To offer opportunities for participation in programs, services policy designation and staff employment to persons regardless of race, color, religion, creed, age, gender, national origin or ancestry, marital status or disability. Refuse to engage in or tolerate in any form of discrimination or harassment.
6. The financial support decisions are made by UW MC annually, and each agency must apply annually for such support.
7. That the commitments made in this Agreement by the UW MC to the Participating Agency, and by the Participating Agency to the UW MC are conditioned upon the providing and receiving of financial support, and are limited to the year in which such support decision is made.
8. That UW MC reserves the right to restrict, limit or terminate funding.

SECTION II:

UNITED WAY OF MORGAN COUNTY AGREES:

1. To recognize that Participant is essentially autonomous and has the right, within the limitations it has voluntarily accepted in this Agreement, to determine its own policies and procedures and to administer its own budget.
2. To keep all channels of communication with its Board and its various committees open to Participant for consideration of problems of common concern.

3. To provide a program/budget review by a representative group of responsible citizens with full opportunity for Participant to describe and explain its services, its program plans and its anticipated financial requirement.
4. To recognize the obligations imposed upon the Participant by any state or national body under which it operates.
5. To conduct an annual, county wide-fund raising campaign designed to reach the highest level of potential giving in order to best meet county human service needs.
6. To honor designated pledges to agencies. If designated pledges exceed the recommended allotment, a supplemental allotment will be made if sufficient contingency funds are available and directed for disbursement by the United Way Board.
7. To act as responsible steward of funds publically contributed through the UW MC campaign by keeping all of its books and records open and available for examination by any person at any reasonable time; by having its financial records audited annually by an independent public accountant or certified public accountant.
8. To make campaign allocations available to the public.
9. To not be held liable for any legal or illegal actions of any participating agency.
10. Provide a network for technical assistance as feasible and build the capacity of Partner Agencies.

SECTION III:

PARTICIPANT AGENCY AGREES:

1. To submit to UW MC a proposed annual program budget containing financial and other information as reasonably may be requested by UW MC.
2. To provide a presentation on agency goals and requested funding at the annual financial and program review allocation hearings.
3. To accept, after being given full consideration and hearing, the allocation decisions of the UW MC's Board of Directors and to operate within the limits of such approved allocation.
4. To provide adequate records showing the funding provided by UW MC is directly benefiting Morgan County's residents.
5. To submit financial reports and requests for funds prescribed by UW MC; to provide such other information as UW MC may reasonably require. Submit reporting required by UW MC by the stated deadline.
6. To have a Certificate of Good Standing in the State of Colorado for a Nonprofit Tax Exempt Agency/Organization .
7. To obtain and keep in effect a ruling from the United States Treasury Department that states that the Participating Agency is not a private foundation that it is exempt from payment of income tax and that gifts to the Participating Agency are deductible for income tax purposes.
8. To maintain an adequate system of records and reports covering both its services and finances; to have its operating, capital and special accounts open to public inspection at any

reasonable time during normal business hours; if applicable, to be audited annually by a certified public accountant acceptable to UW MC and to submit a copy of its annual audit (or suitable financial statements if a Participant is not required by its size to be audited) with its program allocation request. (An annual independent audit is required for agencies with an annual operating budget over \$100,000 or United Way funding over \$10,000). For those agencies that do not meet either of these criteria, an independent review of Participating Agency's finances (and a letter certifying such) by someone outside of the organization and approved by the Board of Directors is required).

9. To actively support and participate in the annual UW MC campaign by conducting an in-house campaign for its board members, staff and volunteers, and when asked, by providing volunteers (board members, staff, other volunteers) to support UW MC campaign activities and by cooperating with the UW MC in other ways to help insure the success of the campaign.
10. To participate in the annual campaign kick-off event and annual meeting/award banquet.
11. To abstain from conducting soliciting campaigns within Morgan County, and to permit no other groups to use the Participating Agency's name for such a campaign, during the period of September 1 to November 30. Any variations to this policy must have approval by the UW MC's Board of Directors.
12. To not solicit funds from employee groups whether by arranging for payroll deductions with employers, conducting

employee campaigns, engaging in workplace employee solicitation of employee groups for the purpose of establishing a payroll deduction plan of any type.

13. To use the official UW MC logo on electronic or printed materials and on signage, advertising, stationary and newsletters and/or recognizing UW MC funding in news releases, annual meetings/reports, special events, etc and to display the UW logo within the Participating Agency office(s).
14. To refrain from discontinuing or making major changes in programs funded by UW MC without receiving UW MC approval and to keep UW informed of all policies regarding eligibility for service and changes thereof.
15. The UW MC funding may not be used for brick and mortar/capital building projects and Participating Agency may not use UW MC dollars for remodeling or renovation, expansion or new construction of office or program site.
16. To advise the UW MC of any changes in its relationship with its national organization, whenever UW MC/Participant relationships are/or might be, affected.
17. To enroll and maintain Participating Agency information in the UW MC 2-1-1 database hosted by the United Way of Weld County.

SECTION IV:

TERMINATION:

1. The UW MC or the Participant may terminate the relationship created by this agreement on sixty (60) days notice, which may be given at any time. Any such termination must be written notification from the board of directors of the UW MC or the Participating Agency and funding shall cease on the effective date of the termination. All unspent funds shall be returned to the UW MC for redistribution.
2. UW MC reserves the right to terminate the relationship created by this agreement without advance notice in the event the Participating Agency fails to meet, at any time, the basic criteria for membership as determined by the UW MC board of directors.

SECTION V:

ANTI-TERRORISM COMPLIANCE AND CHARITABLE STATUS:

In compliance with the USA Patriot Act and other counterterrorism laws, the United Way of Morgan County requires that each agency certify the following:

“I hereby certify that all UW MC funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes and executive orders.

Additionally, I hereby certify that the above named organization is eligible to receive charitable contributions as defined under section 170

[c] of the Internal Revenue Code and our currently registered with the Colorado Secretary of State under the Charitable Solicitations Registration.

IN WITNESS WHEREOF, the parties hereto have caused this agreement to be executed by their duly authorized representative as if the date shown.

UNITED WAY OF MORGAN COUNTY, INC.

By:_____ By:_____

Title:_____ Title:_____

Date:_____ Date:_____

(One signed copy shall be returned to United Way of Morgan County and one kept by the Agency)