



“ONE ASK & STEWARDSHIP”: A PARTNERSHIP WITH FULLY PARTICIPATING AGENCIES

The partnership between Monadnock United Way (MUW) and the member agencies is the cornerstone of MUW’s efforts to meet the human service needs of the community. The partnership between MUW and the member agencies goes well beyond the formal activities of requesting and providing funds. It involves a commitment to work together to make MUW, the agencies and the entire social service delivery system the best that it can be. The partnership is based on mutual respect and is maintained through hard work and open communication.

ACCOUNTABILITY AND COOPERATION

MUW agrees:

- To mobilize and invest community resources back into the community in a strategic manner that will lead to both short and long term outcomes that will positively impact the Monadnock Region.
- To promote the work of Partner agencies within the context of the work of MUW.
- To make available management and technical assistance to our Partner agencies whenever possible.
- To act as responsible stewards of funds publicly contributed to MUW by fully informing contributors of MUW’s allocations and use of such funds.

Agencies agree:

- To keep complete and regular books of accounts open to inspection by the Board of MUW or its designated representatives except where access is prohibited under federal or state Confidentiality Statutes.
- To file with MUW at the end of each fiscal year and otherwise upon request a copy of an annual statement of receipts and disbursements and to submit to MUW such other reasonable information concerning finances, programs, etc. as the Board may require.
- To file with MUW in August of each year a 6 month mid-year report that includes a statement of performance against the goals/metrics established through the MUW allocations process. Failure to do so will result in withholding funds until the report is submitted.
- To actively cooperate with MUW, other organizations and community groups to promote the coordination of planning and programming efforts so as to better meet the needs of the community, prevent the unnecessary duplication of services and ensure the delivery of high quality services.
- To notify MUW Promptly of any pending lawsuits of criminal investigation that might damage the Partner agency in their public standing.

- To continually remind the public of their partnership with MUW at every available opportunity. Please see Marketing Toolbox requirements at www.muw.org.

FUNDRAISING PHILOSOPHY

A primary goal of MUW is to maximize the resources and financial support available to agencies so that they can provide needed services in the community. MUW accomplishes this through the annual campaign, grant and foundation proposals. The basic philosophy of MUW's annual campaign is that MUW makes "one ask" of businesses and individuals in the community, or other funders on behalf of all of the agencies. Individuals and businesses that are solicited are informed that the concept of "one ask for all", and collaborative proposals, replaces multiple solicitations by MUW agencies, and ensures that donations are raised efficiently and used effectively.

Although MUW provides needed funding to many agencies, MUW also recognizes that agencies require a mix of funding sources to meet their financial needs. Therefore, MUW encourages supplemental fundraising that does not conflict with the philosophy of the annual campaign and "one ask" of businesses, individuals and grantees.

FUNDRAISING AND SOLICITATION GUIDELINES

In order to focus the community's efforts on achieving collective goals and affecting positive change, agencies agree to partner with Monadnock United Way in stewardship of a successful Annual Campaign. Additionally, when appropriate, agencies will work with Monadnock United Way as they seek to diversify funding sources, including grants, foundation applications and other resources that can support allocations to agencies in the Monadnock Region.

Following are the guidelines concerning specific types of fundraising and solicitation by MUW agencies:

1. Corporate/Business Solicitation

- Solicitation in the workplace is not allowed among corporations and businesses that contribute to the Monadnock United Way campaign. The current list is available at www.muw.org in March of each year.
- Direct solicitation of corporate foundations supporting the Monadnock United Way Campaign is not allowed without approval of MUW. If you have a question regarding a corporate foundation please call MUW's President. Current foundations *include but are not limited to*: Markem-Imaje, Timken Charitable Trust, Hubbard Farms Charitable Foundation, Bank of America Charitable Foundation, TD Charitable Foundation, Kingsbury Foundation, Hunt Foundation, and Citizens Bank Foundation. *For the current complete list see www.muw.org.*

2. Sales and Special Events

- The sale of an item over an extended period of time (e.g., flowers, raffles, coupon books, T-shirts) or special fundraising events scheduled for a specific time (e.g., dances, auctions, yard sales, dinner, anything-a-thons) should be directed at individuals only, not corporations and businesses.
- Consideration should be given as to the impact on Monadnock United Way fundraising efforts when scheduling special fundraising events and promotional activities.

3. Friends Campaign and Membership Drives

- Target groups should be made up of individuals who have demonstrated an active interest in the agency's work.
- MUW requires a draft copy of the Friends solicitation in advance and will return for change any solicitation letter that does not clearly state that the agency is a recipient of MUW funding, and, if the donor is contributing to MUW, to acknowledge that they are already supporting the agency.

Sample: ***Please note, if you are contributing to MUW, you are already supporting our work, as (your agency) is a recipient of MUW funding – and most grateful for it! In this case, we thank you for considering a second gift to (your agency)!***

4. Capital Fund Drive

- Capital requests should be scheduled so that they do not conflict with Monadnock United Way fundraising efforts. Again, solicitation letters should state that the agency is a recipient of Monadnock United Way funding, and, if the donor is contributing to Monadnock United Way, to acknowledge that they are already supporting the agency.

Sample: ***Please note, if you are contributing to Monadnock United Way, you are already supporting our work, as (your agency) is a recipient of MUW funding – and most grateful for it! In this case, we thank you for considering a second gift to (your agency)!***

5. Sponsorship, Merchandise and Service Requests

As stewards and partners of Monadnock United Way efforts, consideration of the impact on fundraising, the campaign and regional agencies should be given when:

- requesting items or services to be used either in fundraising (e.g., auction, raffle, food at special events) or in agency's own operations (e.g., printing of brochures;

- requesting funding in return for promotional recognition (e.g., listing in special event programs or display ads) among corporations and businesses supporting Monadnock United Way;
- requesting corporate sponsorship to underwrite the cost of programs or fundraising events;
- appeals are made to service clubs, fraternal orders and churches.

Monadnock United Way encourages grant applicants to assess opportunities for collaboration and does not limit:

- grant requests to governmental bodies;
- requests to foundations not supporting Monadnock United Way;
- advocacy related to funding of services.

TIME FRAME

This agreement shall be binding from year to year unless the partnership agency has given written notice to the contrary to MUW at least six (6) months before the opening date of the next financial campaign. Continued MUW funding is conditional upon compliance with this agreement. If, for any reason, a Partner deviates from providing services as stated in the original allocations proposal, loses its tax-exempt status, or breaches any of the provisions contained in this agreement, Partner agrees to contact MUW as soon as possible. Funding may be suspended until the problem is resolved. All funding levels are contingent upon the success of the annual fundraising drive, and could be adjusted depending on the outcome of the campaign.

Agency

Chief Professional Officer

Chief Volunteer Officer

Senior Staff Fundraiser

Key Volunteer Fundraiser

Date