

Partnership Agreement

Between

Mile High United Way

And

[Company Name]

Effective: June 2015-June 2016



Mile High United Way

“Behind the Scenes” for Your Employee Giving Campaign

Mile High United Way is honored to be your philanthropic partner for your employee giving program. Mile High United Way serves two functions for your employees and your company – both as an employee engagement partner for community education and volunteerism and as an employee giving processor to enable your team members to give back in a way that is meaningful to them.

Just as you, as a organization, outsource non-core functions, you have selected Mile High United Way as a partner and a specialist to manage your employee giving program. Our role is to ensure that your giving program is fun and meaningful for your employees, while also maintaining seamless processing to ensure we are meeting donor intent.

The partnership agreement that follows outlines the roles and responsibilities of Mile High United Way and your company with regard to our role as your employee giving processor.

What to Expect from Mile High United Way



Program planning, development, administration, management and communication



Account logistics and tracking for checks, payroll deductions, matching requests, and employee pledges



Vetting receiving organizations to ensure legitimacy and compliance with laws such as the USA Patriot Act



Local staff, in your markets to help you navigate the complexities of corporate philanthropy and volunteerism, provide event coordination, and local engagement and education

Employee giving programs allow employees to invest in causes they care about through convenient payment options but can also pose significant managerial challenges. While Mile High United Way is here to handle the lion’s share of the work, there are key pieces of information that we need from your company to ensure we can effectively process your campaign and honor donor intent.

Below you will find a checklist outlining the items needed to complete this agreement. Our Resource Development contacts are here to assist you in answering the following questions, so please do not hesitate to reach out.



Throughout this partnership agreement you will find our “seal of approval” for the processing options that we most highly recommend based on our 128 years of partnering with businesses throughout the Metro Denver area.

Partnership Agreement Checklist

Steps to completing our Partnership Agreement

- Complete the four sections of the Partnership Agreement:
 - Section 1: Company Profile
 - Section 2: Campaign Logistics
 - Section 3: Processing Costs & Corporate Contribution(s)
 - Section 4: Pledge Fulfillment Processes
- Return completed and signed copy of Partnership Agreement to your Resource Development contact prior to the start of your campaign.



Section 1: Company Profile

Campaign Contact(s)

- The following individual(s) manage / coordinate our campaign, and may be contacted with questions (list as many as applicable, and roles if necessary, for example “campaign chair” or “payroll contact”).

Name	Role/Title	Email

Total # Employees

- Our campaign includes all of our employees, totaling _____ (#).

Notes if needed: _____

Pay Periods Per Year

- Our employees have _____ pay periods per year.

Multi-Location Campaign

- Our campaign includes multiple offices. If yes, please list the included locations:




Section 2: Campaign Logistics

Campaign Timeline

- Our company will host an employee giving campaign in the (circle one):
 Fall / Winter Spring / Summer Year-Round
- The estimated length of our campaign will be (# weeks or months): _____


Campaign Processor (Please select one)

-  Our company will use the online pledge tool, eWay, hosted by Mile High United Way and may also offer paper pledge forms to employees who do not have computer access.
- Our company will only use paper pledge forms.
- Our company's campaign will be managed by a different United Way (please name):
 _____ and the primary contact is (please name):
 _____.
- Our company will use a third party giving tool and processor (please name):
 _____ and the primary contact is (please name):
 _____.

Campaign Reporting (Please select all that apply)

- Because we are using eWay hosted by Mile High United Way, Mile High United Way is responsible for providing end of campaign results reporting to our company.
- Because we are using paper pledge forms (only or in addition to eWay), an appointed person at our company will enter pledge form data into a spreadsheet and provide that spreadsheet to Mile High United Way. If this is an issue and you need Mile High United Way to enter pledge form data, please discuss with your Resource Development contact (*additional fee may apply*)
- Because we are processing our campaign via another United Way or a third party processor, the reports will come to Mile High United Way from (please explain):
 _____.

Rollover Campaign Pledges (Please select one)

-  Our company has previously run an employee giving campaign in partnership with Mile High United Way and will rollover employee pledges into the new campaign year.
- Yes, we will rollover employee pledges after this campaign year, into the next.
- No, we will not rollover employee pledges.
- We are a new workforce campaign partner and we will decide after our first campaign.



Section 3: Processing Costs & Corporate Contribution(s)

Processing Costs: Corporate Sponsorship Opportunity

Many companies may elect to make a corporate contribution to cover processing costs incurred by Mile High United Way associated with employee and/or matching contributions. The benefit of this option is that it allows for all employees' giving (and/or matching contributions) to be processed without processing costs being removed, meaning that 100% of their contribution goes to the designations they have selected.

The size of the corporate sponsorship will be determined upfront and typically ranges from 5-10% of pledges based on the size of the campaign and the amount of funds raised. Please work with your Resource Development Representative to obtain this estimate.

Processing Costs: What to Know

Should your company not cover processing costs, Mile High United Way assesses the following processing fees to each employee gift based on the designation selected:

- Mile High United Way or Mile High United Way programs or initiatives – 0%
- Other United Ways – 0% - 4% maximum
- Childcare (CCCC) and Denver Enterprise Zone Tax Credit Programs – 7%
- Other 501c3 Non-Profit Organizations – 15% maximum

Mile High United Way's fee structure caps each individual donor's fee at a maximum of \$450 per campaign year. The fee will be waived if \$450 or more of the individual donor's total gift is directed to Mile High United Way or one of Mile High United Way's programs or initiatives.

The same fee structure applies to corporate matching dollars, except that the \$450 cap applies to each designation. For example, if a match follows employee designations and five employees designate to Boys & Girls Club, the \$450 cap applies to the *total amount* of each of their gifts (\$450 cap per designation). As a second example, if a match is allocated to Mile High United Way, no processing costs are assessed, in accordance with the outlined fee structure listed above.

Processing Costs (Please select all that apply)

- Our company will provide a corporate sponsorship, covering the cost of processing for employee contributions.
- Our company will provide a corporate sponsorship, covering the cost of processing for the corporate match (if applicable).
- Applicable processing fees should be taken from *employees' contributions*.
- Applicable processing fees should be taken from the *corporate match* (if applicable).

Matching Corporate Gift (Please select one)

Our company will contribute a corporate match of employee gifts at the following rate:

- Yes, we will donate a corporate match at ____% or ____:1.
- Yes, our match has a cap of \$_____ per employee.
- Yes, we will donate a corporate match at a specialized rate (please explain):

_____.
- No, our company will not donate a corporate match.

Matching Corporate Gift Designation (Please select one)

Our company will designate our corporate match as follows:

- Our corporate match will be designated to Mile High United Way.
- Our corporate match will be designated to a Mile High United Way Program or Initiative (please circle; where more than one is circled, please explain the breakdown):
School Readiness Youth Success Adult Self-Sufficiency
Bridging the Gap 2-1-1 Call Center MHUW Child Care
Breakdown (if applicable): _____.
- Our corporate match will follow employee designations.
- Other (please explain): _____
_____.

Annual Corporate Contribution (Please select one)

Our company will make a flat-rate corporate contribution to support Mile High United Way

- Our corporate contribution will be in the amount of \$_____.
- We will make a ____ year commitment in the amount of \$_____ each year.
- We will make a ____ year commitment of \$_____ and increase our gift by \$_____ each year.



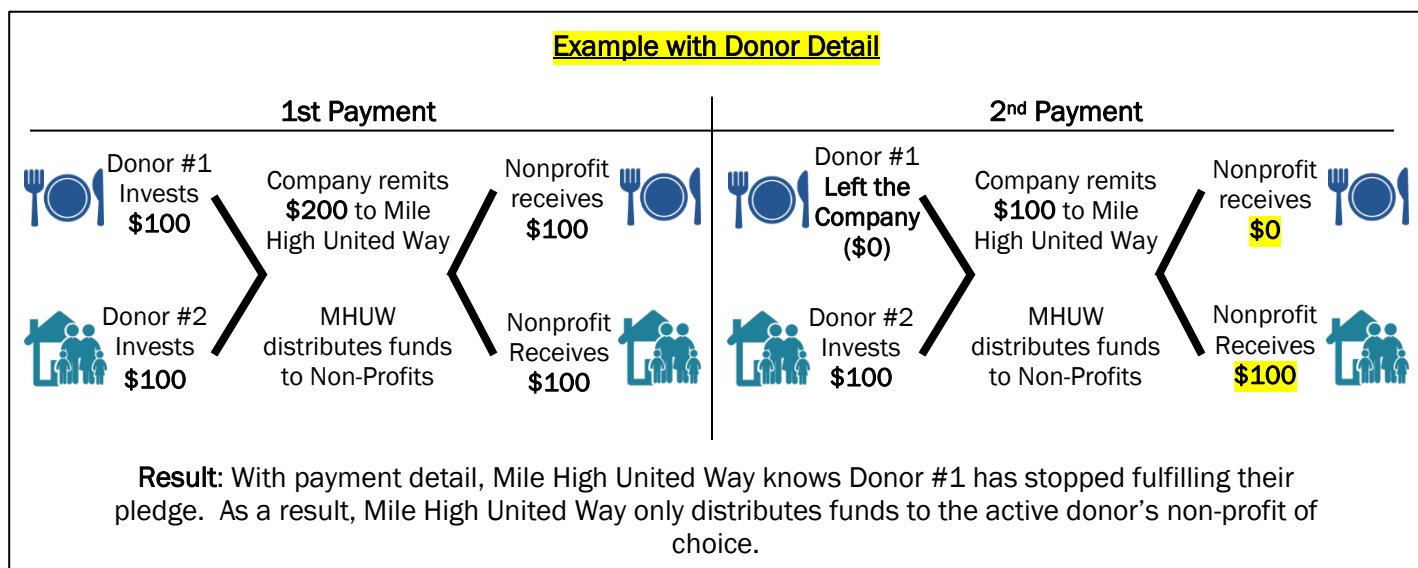
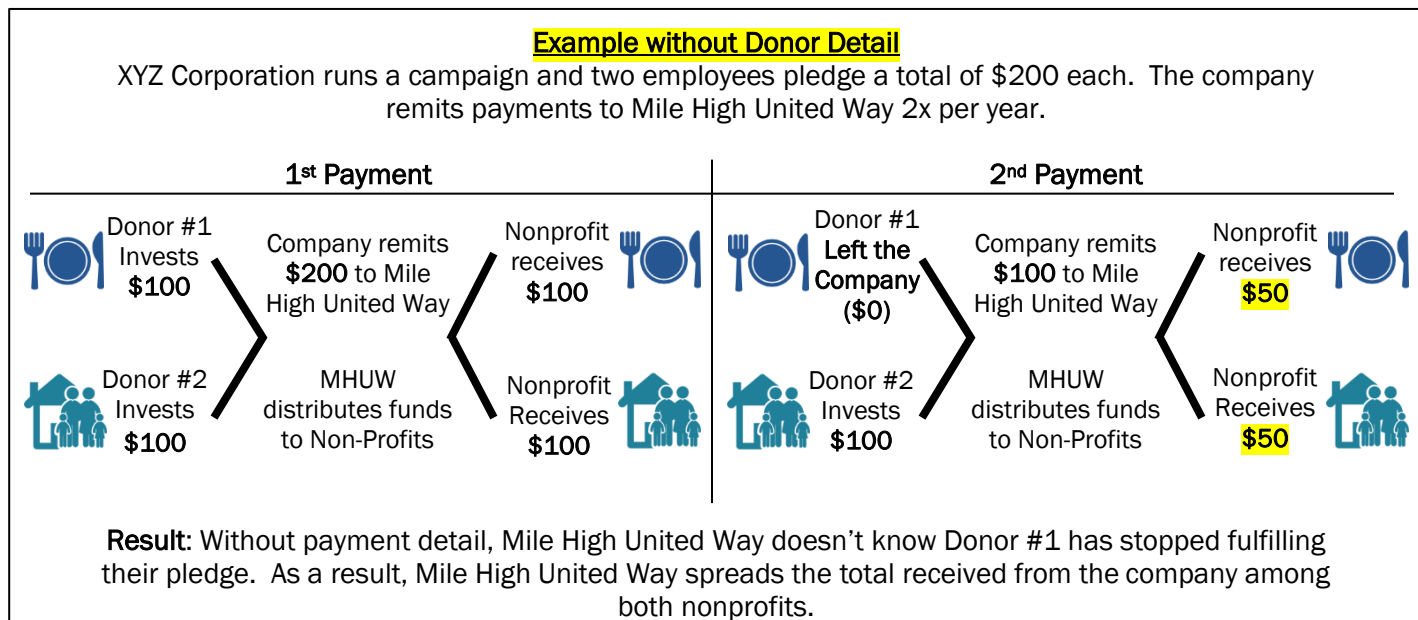
Section 4: Pledge Remittance Process

Pledge Remittance: What to Know

Remittance of ongoing payroll, one-time payroll deductions, and credit card payments can be made on a weekly, monthly, quarterly, or annual basis. If using a third party processor for pledge remittance, the process will be outlined in a later portion. If utilizing eWay, Mile High United Way will provide a donor report at the end of the campaign outlining which of your employees elected payroll deduction.

Mile High United Way strongly prefers to track the collection of funds at the individual donor level instead of at the workplace level. Doing so produces the most accurate processing and designation payout and ultimately a better giving experience for your employees.

Outlined below are two examples – one in which donor information is received and one in which donor information is not received. If donor detail is not provided, Mile High United Way will not know which donor’s designation(s) to discontinue payment to and the payment received will be spread evenly amongst all donors.



Pledge Payout by Mile High United Way: What to Know

Mile High United Way will distribute employee gifts to designated agencies once a month when the total of gifts to that agency reaches \$250 or more. For agencies that do not have gifts designated to them totaling \$250 in any given month, distribution will be made once the minimum of \$250 is reached or in January, whichever comes first.

All non-profit agencies receiving funds via Mile High United Way can access available donor information via an online site called AgencyLink. Each nonprofit has unique username and password for the site. Should an organization not have access to the site they can contact Mile High United Way for their login information.

Pledge Remittance Timing (Please Circle One):

Our company will remit payroll deductions to Mile High United Way



Bi-Weekly



Monthly

Quarterly

Annually

Donor Detail with Pledge Remittance



- Yes, we will provide donor detail, unless the employee selects “anonymous,” with each pledge remittance. (Donor detail should include employee name, email, gift amount and designations).
- No, we will not provide employee names with each pledge remittance and understand the implications of this.

Credit Card Processing



- We are utilizing Mile High United Way’s Eway, so credit cards will be charged and paid to Mile High United Way immediately via the Eway site. Credit card processing fees are included in the overall processing costs.
- We are utilizing a third party processor, but would like Mile High United Way to process credit card gifts. We will provide Mile High United Way with a list of donors and contact information that have selected this option.
- We are utilizing another United Way to process our campaign and credit cards will be charged and paid to Mile High United Way in the following way:

- We are utilizing a third party processor to process our campaign and credit cards will be charged and paid to Mile High United Way in the following way:

Bill Me Selection: What to Know

Mile High United Way will mail a bill to all donors who select “Bill Me” via Eway. Donors who select “Bill Me” via another United Way or third party processor must be communicated to Mile High United Way if it is Mile High United Way’s responsibility to send a bill within 8 weeks of the campaign close.

Donation Tax Receipting: What to Know

Mile High United Way will mail all donors making a one-time gift of \$250 or more a donation receipt by January 31st. For all payroll deduction donors, individual paystubs can serve as the donation receipt for personal taxes.

Congratulations!
**Please sign below and return the completed packet to Mile High
United Way.**

Thank you for taking time to complete this partnership agreement, we are thrilled to be partnered with you!

Signature Page

Partnership Agreement between Mile High United Way and [Company Name]

Effective: June 2015-June 2016

Print Name

Print Name

Title

Title

Mile High United Way

Organization

Organization/Company Name

Signature

Signature

Date

Date