

University of Missouri System Constituent 501(c)(3) Organizations Annual Affiliation Agreement

THIS AGREEMENT, entered into as of this _____ day of _____, 201____, by and between the University of Missouri System, the _____ [name of campus and college, school, department when applicable], and the _____ [name of the organization].

The University of Missouri system is fortunate to have the support of several external partners and organizations that support its four campuses. Given the University's mission to serve the people of Missouri and support the state's economic growth and well-being, constituent involvement and engagement is vital. The constituent and volunteer organizations that advocate for the University provide invaluable insight, support, and community outreach.

In order to fully outline the relationship between both parties, all affiliated organizations need to complete the UM System chartering process annually as outlined in the University's Collected Rules and Regulations (Section 30.030, subsection C). Through the chartering process and signing of this Annual Affiliation Agreement, the expectations and obligations between constituent organizations and the University are outlined. In consideration of the mutual commitments herein contained, and other good and valuable consideration, receipt of which is hereby acknowledged, the parties agree as follows:

UNIVERSITY NAME, SEAL, LOGOTYPE

- Consistent with its mission to help to advance the plans and objectives of the University, the organization is granted the use of the name, [name of university and college, school, department when applicable], pursuant to the terms of the attached license agreement. In doing so, the university and the entire UM System assume certain public perception and legal obligations and risks.

UNIVERSITY OBLIGATIONS

- The University will maintain relevant donor records and will provide assistance to the organization including gift acknowledgement and ongoing stewardship of members, donors, and friends.
- To ensure the accuracy of all donor, alumni and/or member and friend records and information, the university will maintain a primary database for all such relevant information. This safeguards against multiple repositories with conflicting or outdated information. The university's database shall be maintained according to the standards and protocols set forth in the in Curators of the University of Missouri Collected Rules and Regulations ("Collected Rules and Regulations) and the University of Missouri Business Policy Manual ("Business Policy Manual") for security and record retention.

- The university will dedicate the necessary time and resources to ensure that records and information are updated and maintained within the standards set by the Collected Rules and Regulations, IRS 501(c)(3) guidelines and CASE (Council for the Advancement and Support of Education) guidelines.
- To the extent allowed by the Collected Rules and Regulations and the Business Policy Manual, such records will be available to the organization by request to their university liaison.
- The university is responsible for communicating its strategic plan, campus priorities and long-term plans to the organization.
- To ensure effective achievement of the items of this agreement, the university shall hold periodic meetings to foster and maintain productive relationships and to ensure open and continuing communications and alignment of priorities.
- The university will provide necessary and appropriate support and information to the organizations in complying with their obligations under this document, including professional advice on board management, meeting University and Curators' guidelines, and professional advice and counsel on fundraising.
- The specific campuses of the University may put into place additional procedures and policies as it relates to their relationships with their organizations at the campus-level. Those campus-level procedures are supplementary to this System affiliation agreement.

ORGANIZATION OBLIGATIONS

- The organization must comply with the University of Missouri Affiliated 501(c)(3) Organizations and the Office of Development Policies and Procedures attached herewith as Exhibit A and incorporated by reference hereafter.
- The organization must meet all rules and requirements for achieving and maintaining its 501(c)(3), non-profit status.
- The mission or purpose statement should clearly state that the organization's primary purpose is to support the university; a specific school, college or department; or the university's teaching, research, service or economic development missions.
- The organization is responsible for the performance and oversight of all aspects of its operations based on a comprehensive set of bylaws that clearly address the organization and its board's fiduciary responsibilities, including expectations of individual board members based upon ethical guidelines, policies, the Collected Rules and Regulations, and state and federal law.
- All organization expenditures must comply with the Collected Rules and Regulations and the Business Policy Manual as well as the IRS code and be consistent with the organization's mission. Such funds should be audited and/or reviewed as part of the organization's annual audit or financial review procedures.
- The organization's Board is responsible for the control and management of all assets of the organization including the prudent management of all gifts consistent with donor intent.
- Any fundraising undertaken by the Organization will be for purposes consistent with the campus missions and priorities, as set by the Board of Curators, the President of the University, the campus Chancellor and the Unit's dean or director, as appropriate.

- The organization will provide information on all gifts and pledges to the campus and all gifts must be processed in accordance with the Collected Rules and Regulations and Business Policy Manual of the University to ensure consistency and proper stewardship. The organization is responsible for ensuring its gift recording and receipting practices follow Collected Rules and Regulations and the Business Policy Manual and are in tandem with the University’s donor acknowledgement and reporting processes. Further the organization is expected to provide biographical and other important Alumni and donor information in a timely manner to the University.
- Financial records maintained and/or audited outside the University by independent accountants will be made available in a timely manner to the University upon request.
- Any personnel expenditures or personnel payments to university staff support outside of the university payroll system must be approved by the Human Resources office of the campus and the Office of the Chancellor. The campus Chancellor must grant prior approval to use University personnel to perform foundation, fundraising and administrative functions.
- The organization must comply with any gift fee requirements as approved by the Board of Curators and in compliance with state of Missouri laws.
- The university chartering process is completed annually and submitted to the appropriate campus. Changes or updates throughout the year will be communicated to the university in a timely manner to ensure complete and accurate records.

IN WITNESS WHEREOF, the parties have caused this Memorandum of Understanding to be executed by their duly authorized officers as of the day and date first above written.

 Organization Chair

 Dean/Department Head

 Vice Chancellor for University Advancement

 Chancellor

 UM Board of Curators

 Date

APPENDICES:
 Constituent Chartering Process
 Relevant Collected Rules and Regulation
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