

Partner Agreement

I. Affirmation

- A. An agreement will be entered into by June 30, 2024, to cover funding for July 1, 2024, through June 30, 2026.
- i. UWNEMS agrees to provide the full yearly allocation based on board approved levels, contingent upon Grantee fulfillment of this agreement, as well as annual available funds.

II. Both Parties Agree To:

A. COMMUNICATION

- i. Notify each other if there are any major changes to funded programs, including but not limited to personnel changes, legal changes, financial changes, mission or goal changes, dissolution of program, or program mergers.

B. GENERAL

- i. Maintain responsible management with an independent and rotating board of directors comprised entirely of unpaid volunteers that shall meet at least four times annually and keep meeting minutes.

C. MARKETING

- i. Positively discuss UWNEMS partnerships in public arenas.

D. REPORTING

- i. Maintain not-for-profit, 501(c)3 tax exemption status and comply with all applicable laws and regulations.

III. UWNEMS Agrees To:

A. CAMPAIGN

- i. Conduct an annual fundraising campaign, as determined by the UWNEMS Board of Directors, and to provide an efficient and desirable means for the solicitation, collection, and receipt of funds. The campaign shall be conducted among individuals and businesses in the United Way area at the lowest possible cost. Program funding allocations are contingent upon yearly UWNEMS available funding.

1. United Way will offer:

- a. Opportunities for Grantee representatives to speak with corporate and individual donors during campaign presentations and events.
- b. Opportunities for organizations to host facility tours for leadership and corporate donors.

- ii. Honor all donor designations as pledged and paid out during UWNEMS's annual fundraising campaign.

B. COMMUNICATION

- i. Provide in writing any material changes relevant to the Grantee's participation in the Community Impact process such as: deadline changes, personnel changes, site visit schedules, financial commitments, etc.

C. FINANCE

- i. Use UWNEMS's general accounting and budgeting procedures in its own operation and conduct its own operation in a manner subject to sound budget controls and fiscal procedures.
- ii. Disburse to the Grantee its annual program allocation of United Way funds according to the guidelines below so long as the Grantee abides by the provisions of this agreement, the funded program is in existence, and within year specified by this agreement. Payments will be made once per quarter beginning June 2024 and ending March 2026.
- iii. Grantee will be acknowledged and recognized on UWNEMS printed materials and social media as applicable.

- iv. Provide logos, pictures, and other materials needed by organizations for UWNEMS identification, visibility, and marketing purposes.

D. REPORTING

- i. Provide technical assistance as requested by Grantee during semi-annual Community Impact reporting.

E. VOLUNTEER

- i. Offer services through the Volunteer Hub matching individuals to volunteer needs within the organizations.

IV. Grantee Agrees To:

A. CAMPAIGN

- i. Conduct an annual UWNEMS fundraising campaign.
- ii. Support UWNEMS's annual campaign through events and speaking engagements as needed

B. COMMUNICATION

- i. Provide written notification prior to effective date of change or as Grantee Board approved regarding significant program changes including activities, target population, and use of funds.

C. FINANCE

- i. Ensure Community Impact payments are correctly credited to the UWNEMS programs in the amounts as indicated in the 2022 Notice of Funding award notification.

D. GENERAL

- i. Provide services within UWNEMS service area and under an impact area, as identified in grant request.
- ii. Use the UWNEMS logo on digital, print, and market materials, when appropriate.
- iii. Participate in any appropriate events or services as provided by UWNEMS and as available.

E. INSURANCE COVERAGE

- i. Provide proofs of insurance coverage or bond, where applicable.

F. REPORTING

- i. Participate in any program evaluation processes as determined by UWNEMS to include site visits, semi-annual reporting (where applicable) and end-of-year reporting.
 - 1. Attend semi-annual collaboration meetings (roundtables) with impact area partners.
- ii. Grantee communicates in writing of inability to meet reporting deadlines.
- iii. Comply with the United Way policies regarding Anti-Discrimination and the U.S. Patriot Act.

G. VOLUNTEER

- i. Provide the Volunteer Hub with any volunteer opportunities available within the organization (updated at least every 6 months).

V. Failure to Comply

- A. Failure by any Grantee to comply with the terms of this agreement could result in delayed funding, decreased funding, termination of funding, termination of partnership by UWNEMS, or ineligibility to participate in the future.

- B. If the UWNEMS Board of Directors determines that a Grantee is not in compliance with the terms of this agreement, the Grantee will be notified via mail outlining the reasons for such finding and stating the action being taken by the Board.

VI. Delay of Funding

A. UWNEMS reserves the right to delay funds for events including but not limited to:

- Grantee fails to submit a signed Partner Agreement.
- Grantee fails to submit applicable semi-annual reports.
- Grantee fails to fully submit year-end reports.

B. UWNEMS will release funds after satisfactory completion of the above reporting requirements.

VII. Termination of Funding

- A. The Grantee may terminate this agreement and withdraw from its affiliation with UWNEMS by providing a thirty-day written notice to the UWNEMS Board of Directors stating the reason(s) for withdrawal. Funding will cease upon the effective date of termination. Any funds intended for use after date of termination shall be returned to UWNEMS. UWNEMS reserves the right to discuss a Grantee's decision to terminate this agreement with the Grantee's Board of Directors.
- B. UWNEMS reserves the right to withhold, adjust, or cancel allocation payments as well as de-fund programs based upon UWNEMS Board of Directors' determination of a Grantee's failure to comply with the terms of this agreement. Termination shall be accomplished through a vote of the UWNEMS Board of Directors and thirty (30) days' written notice will be given to the Grantee detailing reasons for termination. The Grantee may appeal with a written notice from the Grantee's Board of Directors within 30 days of the termination notice.
- C. UWNEMS reserves the right to terminate funding, withhold funds, or seek corrective action for events including, but not limited to the following:
- Grantee ceases operations or dissolves funded program without proper notice to UWNEMS.
 - Grantee breaches city, state, or federal law.
 - Grantee uses UWNEMS funding for a program or other matters not approved by UWNEMS.
 - Grantee engages in unethical practices as determined by UWNEMS.

VIII. Agreement Acknowledgement

☐ Checking this box indicates the we, _____ and _____ (insert names of Organization Representative and Board of Directors President) agree to uphold the requirements as outlined in this agreement and support UWNEMS in its efforts to improve lives in our region.

