



## **United Way of South Central Indiana Partnership Agreement**

The purpose of this agreement is to define the mutual responsibilities of the United Way of South Central Indiana (UWSCI) and the partner agencies. This agreement outlines in general terms the policies and procedures that concern agency and program involvement, allocations, and fund-raising.

This agreement must be signed and submitted with the grant agreement. If a change of leadership occurs, the new agency director or president must read, sign, and submit a new agreement. Further allocation payments will not be made until this occurs.

**In Consideration of the premises and mutual agreements herein contained, it is hereby agreed as follows:**

### **SECTION I**

#### **Both United Way of South Central Indiana and Partner Agency Agrees:**

- A. Approach the partnership with a spirit of transparency, openness, and shared purpose.
- B. Maintain responsible management through an active, representative governing board that meets at least four times per year and provides oversight of financial, programmatic, and administrative matters in accordance with general standards set for all participating agencies by United Way.
- C. Collaborate to eliminate duplication of services, improve administrative efficiency, and promote the annual UWSCI campaign.
- D. Publicly identify and promote the agency's affiliation with UWSCI in community-facing materials.
- E. Keep one another informed on all matters of common concern.
- F. To provide each other copies of the board of directors' roster and, on request, the bylaws/constitution. Identify and report significant program or financial changes during the duration of this agreement.
- G. To offer opportunities for participation in programs, services, policy designation and staff employment to persons regardless of race, religion, color, sex, national origin, ancestry, sexual orientation, gender identity, disability, housing status, or status as a veteran. Refuse to engage in or tolerate any form of discrimination or harassment. Single gender organizations for children will be recognized as such and not in violation of this agreement.<sup>i</sup>

- H. Understand that financial support decisions are made in one-year grant cycles, and funding is awarded based on timely and complete application submissions.
- I. Acknowledge that commitments under this agreement are contingent upon receipt of funding and are valid only for the duration of the applicable grant cycle.
- J. That UWSCI reserves the right to restrict, limit, or terminate funding.

## **SECTION II**

### **United Way of South Central Indiana:**

- A. Respect the autonomy of each funded partner, recognizing their right to determine their own programs, policies, and budget—within the voluntary commitments outlined in our partnership agreement.
- B. Maintain open communication channels, ensuring that agencies have the opportunity to engage with UWSCI staff and leadership regarding matters of mutual concern.
- C. Honor the governance and regulatory obligations of each partner, including those mandated by national or state-level bodies.
- D. To conduct an annual, community-wide fund-raising campaign designed to reach the highest level of potential giving in order to best meet community human service needs. Conduct annual community-wide fundraising efforts, with the goal of meeting the greatest possible share of local human service needs.
- E. Act as a responsible steward of contributed funds by maintaining transparent financial practices.
- F. Support agency collaboration, creating opportunities for partner organizations to connect, share, and coordinate efforts for greater community impact.
- G. To ensure transparency by making campaign allocations publicly available through a clear and accessible grant process.
- H. Provide technical assistance and capacity-building opportunities when feasible to strengthen partner agencies.
- I. To not be held liable for any legal or illegal actions of any participating agency.

## **SECTION III**

### **Partner Agency Agrees:**

#### **Operations & Financial Management**

- A. Operate as a fiscally responsible nonprofit organization aligned with community needs.

- B. Submit a proposed one-year program budget and any additional documentation as requested.
- C. To accept the allocation decisions of UWSCI's Community Impact Committee and to operate within the limits of such approved allocation.
- D. To provide adequate records showing the funding provided by UWSCI is directly benefiting people living in Brown, Greene, Lawrence, Monroe, Orange, and/or Owen counties.
- E. To submit financial reports and requests for funds prescribed by UWSCI; to provide such other information as UWSCI may reasonably require. Submit reporting required by UWSCI by the stated deadline.
- F. To satisfy the corporation laws of the State of Indiana as a nonprofit corporation (if applicable).
- G. Maintain nonprofit status under Indiana law and IRS Code 501(c)3.
- H. An annual independent audit is required for agencies with an annual operating budget of over \$500,000.
- I. Actively support and participate in the annual UWSCI campaign, including:
  - a. Conducting internal campaigns with board, staff, and volunteers
  - b. Cooperating with UWSCI to ensure campaign success

### **Programs and Accountability**

- J. To submit a complete Grant Application to UWSCI.
- K. Advance outcomes that directly support UWSCI's core focus areas: *Financial Security*, *Healthy Community*, and *Youth Opportunity*. Demonstrate a clear connection between the Partner Agency's work and the goal of helping ALICE families achieve greater stability, access, and opportunity.
- L. Define clear goals, outcomes, and indicators at the beginning of the grant period.
  - a. Collect and report quantitative and qualitative data that demonstrate impact, including:
    - i. Number of individuals/families served
    - ii. Program outcomes and progress toward defined goals
    - iii. Demographic and disaggregated data when available (e.g., income, race, gender, county)

- M. Provide at least one (1) real-life impact story and three (3) photos (with appropriate consent) that help illustrate the impact of grant funds.
- N. Keep UWSCI informed of any policy changes affecting eligibility or access to services.
- O. To refrain from discontinuing or making major changes in programs funded by UWSCI without receiving UWSCI approval and to keep UWSCI informed of all policies regarding eligibility for service and changes thereof.
- P. Refrain from using UWSCI funds for capital projects, including remodeling, renovation, or new construction.

### **Engagement & Branding**

- Q. To attend at least 75% of the United Way Agency Directors Association (UWADA) meetings within the calendar year.
- R. Use the official United Way of South Central Indiana logo on the agency's website and printed and digital materials, including signage, newsletters, reports, and events. Recognize UWSCI's funding in press releases, public events, and annual reports.
- S. Display the United Way logo at agency offices and on the agency website, hyperlinked to UWSCI's website to highlight our partnership.
- T. To participate in UWSCI's events or other initiatives as appropriate (Financial Stability Alliance, The Free Community Tax Service, Community Organizations Active in Disaster (COAD), etc.)
- U. Highlight UWSCI's impact by sharing at least one (1) success story through your organization's social media platforms or newsletters throughout the year. In addition, share at least one (1) post in support of UWSCI's annual campaign during the month of September.

### **SECTION IV**

#### **Agency Violations:**

- A. Each partner agency is responsible for following the Partnership Agreement. If an agency is not compliant with rules and guidelines set forth by the agreement, they will be given the opportunity to attend the next United Way Board of Directors meeting and address the BOD before any penalties will be assessed. Declining the invitation to address the UWSCI Board will result in the appropriate penalty assessment. The agency Director and Board President will be notified of any action in writing.
- B. Violation of the agreement may result in the following reduction in allocation: Violation 1, 10% reduction, Violation 2, 15% reduction, Violation 3, 25% reduction. All deducted funds will be reallocated to the post-fund drive cycle on an annual basis.

- C. An incurred violation will fall off an agency's record after three years of no further violations, with any applicable rollover applied to the next cycle if it remains within the three-year period.

## **SECTION V**

### **Termination:**

- A. The United Way or the Partner Agency 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 by written notification from the board of directors of the United Way or Participating Agency, and funding shall cease on the effective date of the termination. All unspent funds shall be returned to the United Way for redistribution.
- B. United Way 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 United Way board of directors.

## **SECTION VI**

### **Anti-Terrorism Compliance and Charitable Status:**

In compliance with the USA Patriot Act and other counterterrorism laws, the United Way of South Central Indiana requires that each agency certify the following by signing below:

"I hereby certify that all United Way 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."

I attest to the above to be accurate and [Agency Name] will abide by the above as the grant agreement. If there are changes, we will notify United Way of South Central Indiana immediately.

\_\_\_\_\_  
Director/CEO  
Date

\_\_\_\_\_  
Board Chair  
Date

Accepted by United Way of South Central Indiana  
Date: \_\_\_\_\_

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<sup>i</sup> Refer to Nondiscrimination Policy for more information