



United Way
of Kennebec Valley

2021 PARTNER PROGRAM AGREEMENT

between

United Way of Kennebec Valley
(herein called "UWKV")

and

(Partner Program Name: herein called the "Partner Program")

NOTE: This agreement must be signed and submitted annually by February 1.

I. Introduction: UWKV Mission, Vision and Values

- Mission: UWKV unites people and resources to improve lives in our community
- Vision: UWKV envisions a strong, self-sufficient community in which people are educated, financially stable and healthy
- Values:
 - UWKV is:
 - Community Centered – We serve the community, are inclusive of all people, and are responsive to needs
 - Results Driven – We are forward-thinking and deliberate as we translate strategy into measurable and lasting outcomes
 - Collaborative – We champion collective action, align community efforts, and engage different perspectives
 - Leading with Integrity – We foster trust, ensure our work is equitable and transparent, and hold ourselves accountable
- To support UWKV's mission, vision and values, the UWKV and the Partner Program mutually believe that meeting Kennebec Valley's health and human services needs requires:
 - United efforts of all segments of the community
 - An effective and efficient means of meeting those needs through participation in health and human service planning, community-wide fundraising, and the distribution of those funds based upon a volunteer review process
 - A clear understanding and mutual acceptance of the respective roles of UWKV and the Partner Program

II. UWKV agrees:

- To respect the Partner Program's prerogative of determining its own mission, policies, and programs within the community

- To conduct an annual, community-wide fundraising campaign
- To generate community support for UWKV and the Partner Program through robust marketing and communications efforts
- To act as a responsible steward of funds publicly contributed to the UWKV by informing contributors of the distribution and use of such funds, and by submitting all financial records for an audit by independent public accountants
- To provide fair and equitable program and budget review by the volunteer-led Allocations Committee, with opportunity for the Partner Program to explain its application
- To encourage a cooperative and inclusive atmosphere for community-wide health and human service planning, development, implementation, and evaluation
- To provide funds to selected and qualified Partner Programs
- To disburse funds as agreed (and not to withhold the disbursement of funds) unless any of the following conditions exist:
 - An Allocations Committee review reflects financial, programmatic or administrative concerns
 - There is any evidence that funds are used for purposes other than allocated
 - There is a violation of UWKV or Partner Program policies and procedures
 - There is violation of the terms of this agreement
 - There are unforeseen circumstances affecting the collection of funds

III. The Partner Program agrees:

- To comply with UWKV policies and procedures related to allocations by:
 - Cooperating with other organizations and groups, whether private or public, in meeting community health and human service needs, limiting duplication of services, and promoting high standards
 - Keeping accurate records of all expenditures and income on an accrual basis in conformance with the Financial Accounting Standards Board's Accounting Standards for nonprofit organizations; preparing or adopting a balanced budget based upon the available funds from UWKV and other sources; and being responsible for any debts incurred by the Partner Program
 - Providing the UWKV with a copy of the Partner Program's independent audit or financial review annually, as well as providing UWKV with more regular financial reports if requested
 - Submitting the application and supplemental materials to the Allocations Committee by the deadline and cooperating with the Allocations Committee
- To comply with the following additional requirements:
 - Providing an opportunity for staff and/or board members to participate in the UWKV campaign annually
 - Cooperating with and making presentations to support the annual UWKV campaign as needed, with the understanding that the cooperation will be of the kind and amount that will not hinder the work of the Partner Program
 - Identifying its relationship with UWKV by displaying the "United Way Community Partner" logo near the Partner Program's office entrances, on

the Partner Program's website, on stationery, and in publications (Contact the UWKV office to receive the logo file)

- Informing the UWKV of plans to establish or discontinue any services and to discuss with the UWKV how such a change will affect the total needs and services of the community, as well as the current and future needs of the Partner Program
- Providing timely notification to UWKV when major leadership changes occur within the Partner Program
- Refunding UWKV financial support for any program that is discontinued that has been currently supported by these funds, or, alternatively, requesting permission from UWKV to transfer such funds to another program with proof that the service is necessary and appropriate

IV. UWKV and the Partner Program mutually agree:

- To respect the wishes of donors who choose to designate their gifts
- To cooperate actively with one another in promoting volunteerism, community-wide fundraising, community problem solving, and community improvement
- To share openly fiscal, administrative and leadership changes and concerns
- To consult together when problems or misunderstandings arise out of the interdependent relationship created by this agreement

V. General Policies for Partner Program Fundraising:

- Since a significant portion of the UWKV campaign is directed at employee groups, Partner Programs agree not to solicit employee groups for operating expenses at any time
- Partner Programs desiring to approach local corporate foundations to seek support for special projects or campaign drives are asked to consult with UWKV in advance of their intent to apply for corporate funds
- All program-related materials prepared for public distribution by Partner Programs will indicate that the Partner Program receives support from the UWKV and display the "United Way Community Partner" logo (Contact the UWKV office to receive the logo file)
- Partner Programs agree to familiarize associations or individuals who sponsor activities on the program's behalf with UWKV

VI. Terms of Agreement and Evidence of Approvals:

Please return this agreement to the UWKV no later than February 1, 2021.

Name of Partner Program:

Signed By:

Executive Director Date

United Way of Kennebec Valley

Signed By:

Courtney Yeager, Executive Director Date