

United Way of Johnson & Washington Counties  
and  
[PARTNER AGENCY NAME]  
Partner Agency Agreement  
FY26-FY27 (7/01/2025-6/30/2027)

This Agreement acknowledges the partnership between the United Way of Johnson and Washington Counties (UWJWC) and [PARTNER AGENCY NAME] in addressing our community's most pressing social needs. We are honored to work with you, and to continue fostering our relationship based on the principles of mutual respect, cooperation, inclusiveness, transparency, and high standards.

As parties to this understanding, both the United Way of Johnson & Washington Counties and [PARTNER AGENCY NAME] commit to:

1. **Working together on matters of mutual interest** in service to Johnson and Washington Counties and partnering in a manner that ensures we remain responsible to each other and the community we serve.
2. **Fostering a strong, respectful partnership** by maintaining open, honest, and frequent communication.
3. **Cooperating with other agencies** to meet community needs, promoting high standards of efficiency, effectiveness, and quality.
  - a. Submit scheduled activities and fundraisers to UWJWC for online calendar to enable partner agencies to avoid scheduling conflicts:  
<https://www.unitedwayjwc.org/calendar>
4. **Maintaining an active volunteer board of directors** which meets regularly to oversee and manage the agency's goals through appropriate policies and procedures.
5. **Evaluating programs collaboratively and reporting results to stakeholders**, enhancing the community's understanding and appreciation of human service in Johnson and Washington Counties.
6. **Providing services on a non-discriminatory basis.**
7. **Complying with laws and reporting requirements** for 501(c)(3) tax-exempt organizations, ensuring all funds are used in accordance with anti-terrorist financing and asset control laws, regulations, and rules.
8. **Promptly informing the other party of circumstances** that may affect the ability to fulfill commitments or that might reasonably be of interest or concern.

## UWJWC commits to:

1. **Raising funds** in an annual, community-wide campaign to address health and human service needs and positively impact key community issues.
2. **Being responsible stewards of funds** contributed by the public to the United Way, by informing contributors about fund allocation.
3. **Promoting the identity and accomplishments** of partner agencies whenever possible and appropriate.
4. **Maintaining the confidentiality** of sensitive information provided by partner agencies.
5. **Visiting partner agencies** to observe activities; meet with staff members; discuss results, successes, and challenges; and problem-solve together.
6. **Serving as a hub for organizational support**, hosting or promoting learning and educational opportunities for partner agencies to develop, strengthen, and improve management practices, service delivery, and accountability.
7. **Providing comprehensive volunteer programming**, including community-wide recruitment and referral, an online volunteer platform, a Volunteer Administrator's Network for professional development, and promotion of agency volunteer needs.  
<https://unitedwayjc.galaxydigital.com/>
8. **Providing an online calendar** for agencies to submit activities and events to avoid scheduling conflicts: <https://www.unitedwayjwc.org/calendar>
9. **Making the UWJWC annual report, audit**, and other appropriate information available to partner agencies.
10. **Accepting donor-designated funds** to specified partner agencies, with designations distributed in April and October.
11. **Providing an online grant portal** for submitting joint funding applications and outcome reporting for United Way funding and other joint funders in the area.
12. **Conducting a Community Assessment** at least every five years, communicating to the public the needs and priorities of the community, and tracking progress on those goals.
13. **Investing funds** based on community needs assessments, local priorities, performance measures, and available funding.
14. **Providing a 60-day notice** if UWJWC needs to make mid-year funding adjustments based on pledge and donation collections.

As a partner receiving funds from the United Way of Johnson and Washington Counties, [PARTNER AGENCY NAME] commits to:

1. **Maintaining up to date contact information and submitting timely and accurate bi-annual reports** on or before:
  - January 30
  - July 31

*Note: The reporting schedule for the FY26–FY27 funding cycle has changed to bi-annual reporting. In collaboration with other joint funders, we are transitioning from quarterly to twice-yearly reports. This change is intended to reduce the reporting burden and allow agencies more time to provide accurate and detailed information.*

2. **Registering with and maintaining an up-to-date profile at 211** to assist community members in finding and utilizing your services.
3. **Maintaining the confidentiality of sensitive information provided by United Way.**
4. **Honoring the following fundraising parameters** (see Appendix A for additional details):
  - a. Refraining from soliciting businesses to initiate employee campaigns for your organization’s direct benefit and not conducting payroll deduction fundraising campaigns outside of your own organization.
  - b. [PARTNER AGENCY NAME]Refraining from seeking direct donor designations of pledge donations from UWJWC campaign partners.
5. **Participating in the UWJWC campaign**, as available and agreed upon, through one or more of the following activities:
  - a. Conduct a staff and board United Way campaign.
  - b. Request that your board members promote a UWJWC corporate gift and/or employee campaign at their place of work.
  - c. Offer agency tours or participate in agency fairs.
  - d. Provide agency information to United Way to share in campaign materials.
  - e. Speak to employee groups about your organization and partnership with UWJWC.
  - f. Participate in public campaign events such as Kick-Off and Community Celebration.
  - g. Other activities as determined in partnership with the UWJWC team.
6. **Promoting the value-added benefits of the UWJWC relationship** by:
  - a. Including the UWJWC logo, digital links, and communication links in organizational literature, your website, on your premises, and in publications about your organization and services.
    - i. Utilize brand standards with all promotional activities:  
<https://www.unitedwayjwc.org/accountability>

- ii. UWJWC digital links and communications link to: <http://www.unitedwayjwc.org>
  - b. Acknowledging UWJWC partnership status, as it relates to the funded program(s) and/or supported services, in contact with the media.
  - c. Collaborating with the United Way Volunteer Center, assisting in identifying volunteer projects for Days of Caring, and promoting agency volunteer opportunities through the website: <https://unitedwayjc.galaxydigital.com/>
- 7. **Consistently attend Partner Agency Meetings** to share agency updates, connect with partner agency peers, and collaborate to work towards improving community issues.
- 8. **Ensuring that UWJWC has current copies of the following organizational documents**, submitted along with funding applications:
  - a. Current audit\*
    - i. *Less than \$100,000: In house year-end financial statement signed by Partner Agency Director and Board President*
    - ii. *\$100,001 - \$499,999: Annual review by certified public accountant*
    - iii. *\$500,000 and over: Annual Audit level statement*
  - b. IRS Form 990
  - c. Updated board member list
- 9. **Completing the United Way Funding Application** process and participating in Community Impact Council site visits.
- 10. **Acknowledging that FY26-FY27 funding may be reduced or eliminated** if [PARTNER AGENCY NAME] agency plans on closing or discontinuing services.

## Schedule for Submitting or Notifying About Key Documents and Organizational Updates

Item	Timeline
Signed Partner Agreement	Due June 27, 2025
Most Current Audit or Financial Review Most current 990 Board Member List	Due with funding application
Change in Executive Director or key personnel	Notify Director of Community Impact and Engagement as soon as possible, and not to exceed 15 days from date of resignation, change, or hire.
Mergers/Consolidations	Provide information in writing as soon as possible and not to exceed 30 days before action is finalized.
Agency Closure or Discontinuance of Services	Notification to Director of Community Impact and Engagement as soon as possible and not to exceed 15 days from Closure or Discontinued Service
Bi-annual Reports	Due January 31 and June 30.

## Terms and Conditions of the Partner Agency Agreement

At United Way, we believe in the idea that we are stronger together. Together we make an important difference, and together we commit to being good stewards of community dollars.

For this reason, we ask that you uphold all aspects of this partnership agreement for funding to be assured, and we agree to do the same. We are grateful for all you do and look forward to a wonderful year ahead.

### Funding Cycle and Award Terms

Partner agency funding is now awarded on a two-year cycle. The application submitted in October 2024 applies to the FY26–FY27 funding cycle, which begins on July 1, 2025, and ends on June 30, 2027.

Funding awards for the first year of the cycle (FY26) reflect the total investment amount for that fiscal year. This amount will be distributed in monthly installments. United Way will honor this same total investment amount for the second year (FY27), contingent on overall campaign performance and the availability of partner agency investment dollars.

If available funds for partner agency investments increase or decrease in FY27, investments will be adjusted accordingly, on a percentage basis, across all funded agencies.

### Dissolution of Partnership

This partnership agreement may be terminated at any time through mutual agreement between the Partner Agency and UWJWC. Requests for termination must be provided with a 60-day written notice to either the Agency's or UWJWC's Board of Directors.

### Partner Agency Status

Partner Agency agreements are time-limited and renewable by mutual consent. Partner Agency status does not constitute a commitment to funding beyond the current funding cycle.

#### I. Noncompliance

United Way of Johnson & Washington Counties (UWJWC) values its mutually beneficial relationship with its Partner Agencies and clearly outlines expectations in the Partner Agency Agreement. United Way is committed to upholding these agreements and expects the same commitment from all Partner Agencies. If a Partner Agency becomes non-compliant with this Agreement, the following steps will be taken.

1. **Identification and Initial Discussion:** Upon identification of non-compliance, UWJWC will initiate a conversation with the Partner Agency to collaboratively address and resolve the issue. This discussion aims to understand the challenges and work together towards a solution.
2. **Action Plan Development:** If non-compliance persists after the initial discussion, UWJWC and the Partner Agency will jointly develop an action plan with specific steps and timelines to rectify the non-compliance issues.

3. **Temporary Withholding of Investments:** Should the non-compliance issues remain unresolved, UWJWC will temporarily withhold investments until all requirements are met. This measure ensures that both parties remain focused on achieving compliance.
4. **Review by Community Investment Committee:** If non-compliance continues for more than 30 days, the situation will be reviewed by the Community Investment Committee. The Committee will assess the progress and determine the next steps.
5. **Potential Reduction or Revocation of Investments:** If non-compliance continues beyond 60 days, UWJWC may issue a Notice of Non-Compliance and consider actions to reduce or revoke specific monthly investment payments, taking into account the nature and seriousness of the violation as well as the existence and nature of past violations.
6. **Provisional Status:** Any non-compliance issue occurring more than twice in a given funding cycle, or indicating a more serious issue, will result in UWJWC placing the agency/program on Provisional Status. This information will be reported to the Community Impact Council in the subsequent investment cycle.

All communication regarding non-compliance issues, changes in status, and related matters will be in writing and sent directly to the Partner Agency's Executive Director and Board Chair and copied to the UWJWC Board Chair.

## **II. Appeal Process**

Partner Agencies receiving a Notice of Non-Compliance may appeal. The appeal must be outlined in writing, specifically indicating substantiating data and the reasons for the appeal.

The appeal must be submitted to the UWJWC Director of Community Impact and Engagement and addressed to the UWJWC Board of Directors Executive Committee within 10 business days from the date of the Notice of Non-Compliance.

Upon receipt of a written appeal, the UWJWC Board of Directors Executive Committee Chair will convene a meeting to determine if the Community Investment Committee followed established procedures in the Non-Compliance decision. Within two weeks of the appeal, the UWJWC President and CEO and UWJWC Board Chair will notify the Partner Agency of the final decision.

## **III. Provisional Status**

a. Upon recommendation of the Community Investment Committee and with the approval of the UWJWC Board of Directors, a Partner Agency may be placed on provisional status when one or more serious problems are identified within the agency that put its continued affiliation with UWJWC in jeopardy. These problems may be in areas such as service delivery, board activity, agency administration, fiscal management, cooperation with other agencies, or noncompliance with the United Way Agency Agreement.

b. The Director of Community Impact and Engagement and the Community Investment Committee will meet with the Partner Agency and its board representatives to discuss the actions required for lifting provisional status. UWJWC will provide written documentation outlining problems and time frames for the agency responses and actions. An agency may be

placed on provisional status for a period of up to 24 months. The Committee will require periodic reports during the provisional period to ensure that the agency is making satisfactory progress on addressing the identified problems.

c. If the Partner Agency fails to make the required improvements within the time frame specified by the Committee, it will lose its United Way Partner Agency status.

## Acknowledgment of this Agreement

To maximize and coordinate community financial support of health and human services, and to maintain public confidence in our joint efforts, we the undersigned, agree to the roles and responsibilities outlined above.

**[PARTNER AGENCY NAME]**

Partner Agency	EIN
Partner Agency Executive Director/CEO	Date
Partner Agency Board Chair/President	
UWJWC CEO & President	Date
UWJWC Board Chair	Date

## Appendix A

### United Way of Johnson & Washington Counties Fundraising Policy

#### I. Philosophy

United Way and its partner agencies are committed to the effective and efficient delivery of health and human services for the benefit of our community. While United Way significantly contributes to assessing and funding these services, it is not feasible for the United Way campaign alone to meet all the financial needs of the agencies addressing community needs. Therefore, agency efforts to generate self-supporting revenues are seen as an appropriate and essential part of our community's collective support of human services.

#### II. Purpose and Intent

To maximize community giving to the voluntary sector, United Way and its partner agencies agree to a set of fundraising guidelines. These guidelines define the roles and responsibilities of both United Way and its partner agencies, fostering a better understanding and cooperation between both parties and the donor public.

#### III. Guiding Principles

- A. United Way encourages and supports its partner agencies' efforts to pursue sources of revenue and to participate in fundraising activities.
- B. We will work collaboratively to maximize the efforts of the UWJWC Campaign with minimum burden to the partner agencies, to UWJWC, and to other community organizations.