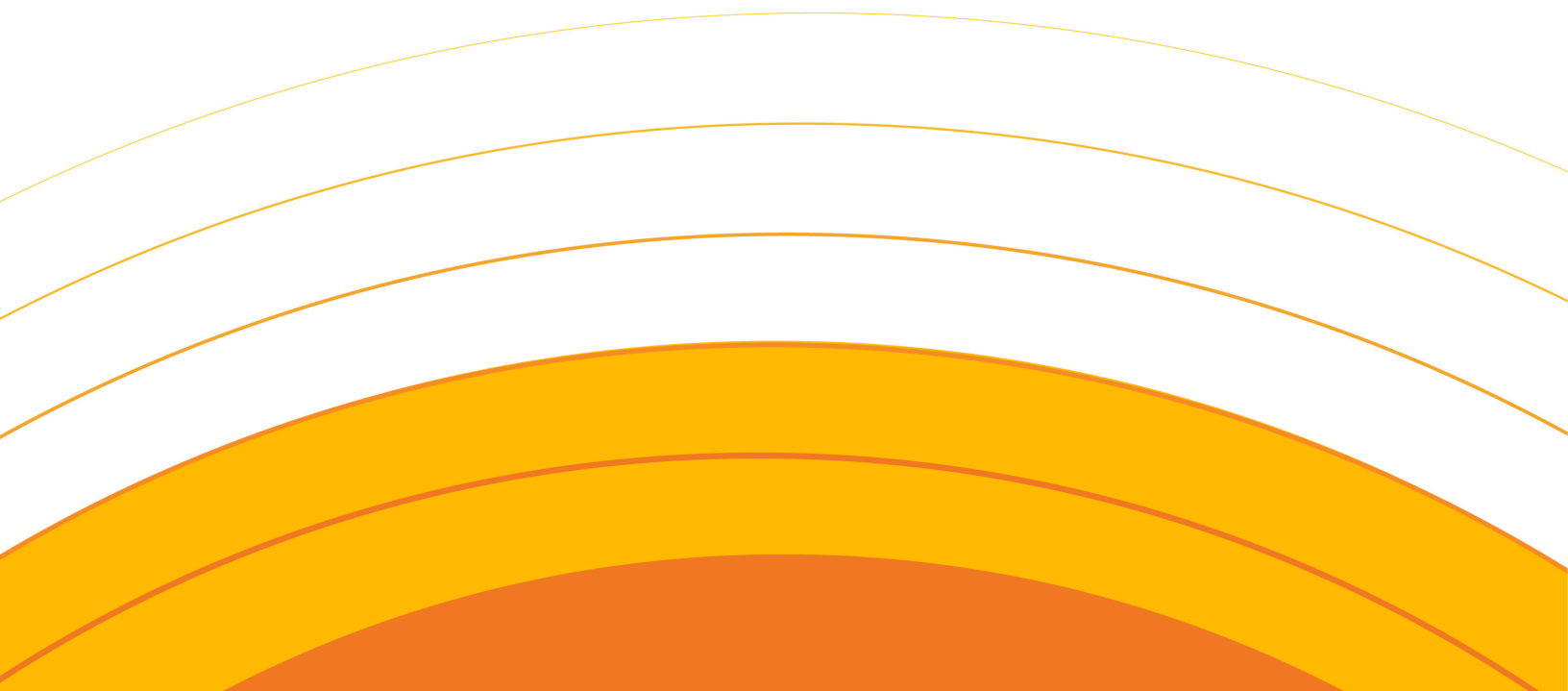




Partner Program Agreement

Together We Thrive

Publicity, Reporting, and Partnership Guide for funded Partner Programs



Outline

By working together, United Way of Southeastern Connecticut and our Partner Programs will be able to reinforce common messaging, promote each other's work, and increase positive outcomes by expanding our reach.

Organizations receiving United Way support will adhere to these guidelines in communications related to the funded program.

Partner Program Checklist

Opportunities in Partnership

United is the Way

Partner Program Agreement Terms

- Counter-Terrorism Compliance
- Anti-Discrimination Policy
- Partner Program Funding Terms

Program, Data, and Financial Reporting

- Program Interim Report
- Financials
- Impact Story Guide

Publicity Guidelines

- United Way Logo Use
- Publicity Commitments

Electronic Funds Transfer (EFT) Form

Partner Program Agreement Signature Form

Partner Program Checklist

Below is an abbreviated checklist of Partner requirements. Details are given throughout the following pages for each along with additional publicity guidelines and general United Way information. Any changes or updates to the below will be sent via email to the organization's Executive Director / CEO.

Annual Documentation & Reporting

- ☐ Partner Program Agreement (this document)
- ☐ Impact Story
- ☐ Annual Program Report
- ☐ Financial Audit / Form 990

Due Dates	2025	2026	2027	2028
Partner Program Agreement*	July 10	July 10	July 10	
Impact Story		July 31	July 31	July 31
Annual Program Report		August 31	August 31	August 31
Financial Audit / 990		January 31	January 31	January 31

*Allocations will be withheld until the signed document is received.

United Way 2-1-1

- ☐ Funded program is listed and updated (Annual)
- ☐ 2-1-1 link on Partner Organization's website

Publicity

- ☐ UWSECT logo on program webpage
- ☐ UWSECT window sticker at funded program location

United Way Campaign

- ☐ Run a United Way campaign for at least one of the following (Annual):
 - Organization's Board of Directors
 - Organization's Employees

Opportunities in Partnership

Below is a list of the top-ten partner benefits with many more available.

- 1. Host a Day of Caring Project**
From small volunteer events to large, funded projects, there are many ways to tap into United Way's volunteer support. Your organization's teams can join other UWSECT and Food Center events too!
- 2. Engage on Social Media**
Ensure you engage with UWSECT on social media so we can raise our collective efforts, together. UWSECT's handle is @unitedwaysect. Common tags #Unitedistheway,
- 3. Join the Speakers Bureau**
Partner Organization leadership can join United Way on the campaign trail to share your program(s) impact and real stories. There are year-round opportunities to speak at large donor-engagement events and celebrations that highlight your team's impact and help raise funds on your programs' behalf.
- 4. Provide Program Tours**
Offer on-site tours of your program(s) for United Way donors and corporate partners to best appreciate where their funds make impact.
- 5. Training Institute**
Join quarterly, peer-to-peer learning events hosted by United Way and led by experts amongst our 81 community partners.
- 6. Council of United Way Organization Executives**
Funded organizations will be invited to the independent council which represents the executive leadership across all funded organizations.
- 7. Join in a Collaborative**
United Way convenes and facilitates three collaborative initiatives with over 60 partners: Southeastern CT Childcare Collective, Eastern CT Health Collaborative, and New Capacities (centered around increasing the financial stability of Norwich residents). Join, align, and contribute your expertise!
- 8. Advocate**
Join United Way's advocacy efforts that support ALICE households in Southeastern CT. Also, include United Way in your own advocacy work too; letters of support, events, etc.
- 9. Access to Conference Rooms**
Free access to United Way's 70-person conference room and meeting space with presentation and virtual meeting capacity. United Way also maintains a list of free community meeting rooms throughout the region.
- 10. ALICE Data & Presentations**
United Way provides the annual ALICE Report free to the community. Partners can invite United Way to in-person or virtual presentations to staff, board, and other events.

United is the Way

Understanding United Way's Role as Your Partner

Since 1962, United Way of Southeastern Connecticut has raised millions for our funded network of non-profit partners, known today as Partner Programs. Since our founding, **United Way's core mission has been to energize the community to give on behalf of programs such as yours.** United Way coordinates an annual fundraising campaign, identifies key community needs, and invests the donor-raised funds in crucial health and human services in New London County.

United Way's Annual Fundraising Campaign

Workplace Giving

Each year United Way's small team of fundraisers coordinates with over 67 volunteer Employee Campaign Coordinators (ECC) across 118 companies. In collaboration, the ECC's run the giving campaigns amongst fellow employees, raising the bulk of United Way's fundraising contributions.

Corporate Giving

Generous donations from businesses both large and small are a part of United Way's giving.

Individual Annual Giving & Events

Individual community members including retirees, families and event participants all make contributions to United Way's support of our community.

United Way Raises over \$4 Million Annually on behalf of our community and Partners.



11,820 Individual Donors
80 Corporate Donors
118 Workplace Campaigns

Partner Programs

Support towards community needs within four Impact Areas through the Allocations process.

Donor-Raised funds invested in community

Gemma E. Moran United Way / Labor Food Center

Collects and distributes the equivalent of 2M meals annually through 65 member programs.

Keep In Mind...

- The more funds raised with your support, the more United Way has to give. **Join the Speaker's Bureau to assist United Way** in telling your program's impact story.
- United Way's individual donors and corporate partners are critical relationships that ensure funding is available to support all Partner Programs. United Way is not able to share these connections as they are already engaged in raising funds on your behalf.



Counterterrorism Compliance

In compliance with the USA PATRIOT Act and other counterterrorism laws, United Way of Southeastern Connecticut requests that each funded Organization certify the following Counterterrorism Compliance.

By signing the Partner Program Agreement, you acknowledge compliance with the following:

- ☒ This Organization is not on any federal terrorism “watch lists”, including the list in Executive Order 13224, the master list of specially designated nationals and blocked persons maintained by the Treasury Department, and the list of Foreign Terrorist Organizations maintained by the State Department.
- ☒ This Organization does not, will not and has not knowingly provided financial, technical, in-kind or other material support or resources to any individual or entity that is a terrorist or terrorist organization, and or that supports or funds terrorism.
- ☒ This Organization does not, will not and has not knowingly provided or collected funds or provided material support or resources with the intention that such funds or material support or resources be used to carry out acts of terrorism.
- ☒ This Organization does not, will not and has not knowingly provided financial or material support or resources to any entity that has knowingly concealed the source of funds used to carry out terrorism or to support Foreign Terrorist Organizations.
- ☒ This Organization does not regrant to organizations, individuals, programs and/or projects outside of the United States of America without compliance with IRS guidelines
- ☒ Certifies 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..



Non-Discrimination Policy

By signing the Partner Program Agreement, you acknowledge compliance with the following:

- ☒ This Organization has affirmed a policy that it does not discriminate or permit discrimination in employment or volunteer service on the basis of race, color, creed, religion, age, marital status, familial status, national origin, ancestry, sex, gender identity, veterans status, developmental disability, mental disability, physical disability, learning disability, lawful source of income, sexual orientation or on the basis of any other characteristic protected by state or federal law, except in the case of a bona fide occupational qualification.
- ☒ Affirmed a policy that, although it may operate programs legitimately designed to meet the specific and special needs of a target population possessing one or more of these protected characteristics, such as age, gender, and health or disability status, it will not engage in or permit any discrimination in the provision of services to individuals or groups on the basis of other criteria specified in paragraph one.



Partner Program Funding Terms

Notes on Funding Award

The Partner Agreement and Partner Program Award Letter are not a guarantee of funding. All funding is contingent upon the availability of United Way funds and the organization's ability to provide quality service to program participants, assessed annually through data, narrative and financial reporting.

- United Way of Southeastern Connecticut **may adjust the amount or terminate payment of funds** allocated to a Partner Program due to:
 - Significant changes to the funded Partner Program including closure of program, relocation outside of UWSECT's service area, or significant and sustained decreases in enrollment.
 - Significant concerns in the organization's annual financial review.
 - Should it be determined that funds were not used as specified by the organization during the allocations process, the United Way Board of Directors reserves the right to reclaim funds that were distributed.
 - Failed compliance with this Agreement and/or reporting and documentation requirements as outlined in the Partner Program Checklist in this document.
 - Significant changes in the amount of United Way's Campaign donor-raised funds.
- Partner Program funds may not be used for fundraising efforts, advocacy or lobbying, political activism, or sponsorships.
- Funds must be used for the awarded Partner Program.
- United Way funds programs, not organizations. Funding awards are not transferrable to other programs within the organization.

Funding Sources & Award Payments

There are multiple funding sources within the Partner Program award:

- **Allocation Funds** are general United Way donor-raised funds and are distributed evenly on a monthly basis. These may include Target Care funds within a specific Impact Area.
- Organization **Designations** (donor-directed funds) are a part of the total award and distributed quarterly.
 - Designations are based on donor pledges rather than actual receipts; payments may be less due to unfilled pledges.
 - It is recommended that designations be spent for the awarded Partner Program(s), as they are factored into your total award amount, though it is not required and may be used for general Organization operations.

Partner Program Funding Terms

Annual Award Calculation

Partner Program funding is based annually through recommendation of the UWSECT Allocations Committee and approved by UWSECT's Board of Directors . The award for Year 1 establishes the baseline funding for the program. Year 2 and 3 awards are then established by the program's baseline funding as a portion of the total Allocation funds as approved by UWSECT's Board of Directors.

Award Funding Periods by Fiscal Year

- Year 1: July 2026 to June 2027 (FY27)
- Year 2: July 2027 to June 2028 (FY28)
- Year 3: July 2028 to June 2029 (FY29)

Payment Method & Schedule

Payment is made via Electronic Funds Transfer (EFT). Organizations not already receiving payments from UWSECT via EFT will need to submit an EFT form (see last page) with this signed agreement.

Type of Award Payment	Issued	Schedule	Sender
Allocation & Target Care Funds	12 Monthly Payments	Monthly: July - June	"UWSECT"
General Designations	5 Quarterly Payments	Quarterly: Beginning June	"UWSECT"

Note, designation funded disbursements may begin prior to award notice.

Organization's Board of Directors

The awarded Partner Program organization meets all Board of Directors requirements as stated in the organization's bylaws, including number of board members and number of meetings held per year.

Changes in Program

United Way's Partner Program funding is allocated for specific programs, not to the organization as a whole. Considerable changes from the original program proposal must be communicated to and approved by United Way. Funding awards are not transferrable to other programs within the organization.

Sub-Awards

Partner Program funding may not be grant awarded by the Organization to subrecipient non-profit organizations outside of a vendor/contractor relationship.

No Goods or Services

The Organization agrees that no goods or services have been provided in exchange for this grant, and that it has been made at the discretion of UWSECT's Board of Directors.

Annual Reporting

Annual Program Report

Each Partner Program submits a Program Interim Report **by August 31** each year. Reports are submitted online via United Way's [Temelio](#) portal for each program.

Data: Participant Counts

- # of Individuals served (unduplicated)
- # Served by Gender
- # Served by Age categories: under 5yo, 5-12, 13-18, 19-64, 65+
- # Served by Race/Ethnicity
- # Served by Town

Data: Outcomes & Indicators

- Report on the previously selected Outcomes & Indicators for the program's Impact Area.
- Respond to the # of individuals served under "Reach"
- Respond to the outcomes achieved by % impacted under "Result"

Financial Audit & 990

Each Partner Organization submits their Annual Audit **by January 31** each year. Documents are submitted online via United Way's [Temelio](#) portal, just one per Organization.

Financial Documentation Requirements

- Submit the Organization's **Annual Financial Audit and Form-990**. The management letter must be included as well.
- If the Organization is not required to complete an Annual Audit (see Federal requirements), then only the Federal Form-990 is required.

United Way's Finance Review Panel volunteers conduct an annual review of all funded Partners to ensure donor funds are invested in financially stable organizations with positive accounting practices. If there are concerns, United Way staff will communicate with indicated Partners.

Impact Story

Each Partner Program submits one Impact Story **by July 31** each year. Reports are submitted online via United Way's [Temelio](#) portal for each program.

Impact Story
Guide



Impact Story Guide

Why does United Way need Impact Stories?

United Way raises millions in donor funds from 12,000+ donors every year. Those donors give because they see a need in the community. They hear of the collective impact of United Way's Partner Programs and **they understand this impact because of real, relatable, and emotional impact stories**. Partner impact stories are truly what compels donors to give and contribute to United Way's network of Partner Programs.

Defining a Story

What a Story Is

1. There is a **beginning, middle, and end**
2. A Story happens in a particular **moment**
3. There is **emotion**, not just **information**
4. There are characters to **care** about and something at stake

What a Story is Not

1. A Story is not a **bullet points of facts / benefits / info**
2. A Story is not **impressive data / numbers**
3. A Story is not **jargon / high-level values**
4. A Story is not a **walkthrough on how your program works**

Guidance

Technique

- Concise! The sweet spot is **200-250 words**
- Descriptive: **who, why, what, impact**
- **Connects the dots** between your impact story and your program's data (indicators, outcome)
- The "how" of your program, the mechanics / operations, is not important for this story
- Relatable
- Timely

Your Audience

- **Your audience is United Way donors**
- United Way's donors are a little of everyone and are not familiar with your specific industry
- **Use common language**. Avoid industry terms.

Elements of an Impact Story

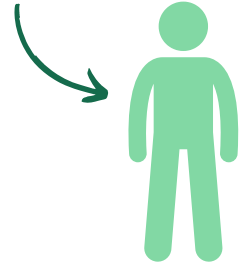
Main Character

At the core of an impactful story is the main character. **In this case your participant or client.** The more descriptive we can be the better!

This looks like:

- This is a real person. Giving the client a name (pseudonym is fine).
- Description - demographics (age, gender, socioeconomics).
- Client circumstance - where were they in life when looking for assistance?

Jennifer



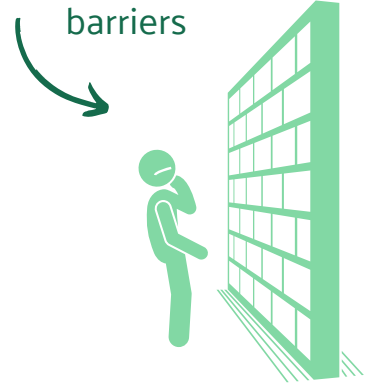
Identify Barriers

Now, identify the barriers the character is facing. What is preventing them from accessing housing, healthcare, education, work, etc.

This looks like: Physical barriers / challenges or Systemic barriers

This does NOT look like: Specific examples that the audience can't relate to. Reminder, your audience is a community donor, not someone informed on your industry or service.

Real or perceived barriers



What Your Program Did

Next, share with the audience the WHAT. What did your agency do to help the client overcome those barriers?

This looks like:

- What services you provided
- What tools or sources you shared
- What connections you made

This does NOT look like:

- A step-by-step description of how you worked with them or the process they followed within your organization

Supports your program provided



Elements of an Impact Story

What This Accomplished

Next is the “What Then.” This is the one-year later scene at the end of a movie.

This looks like:

- Where (in life) is Jennifer now?
- What is Jennifer now able to do / experience / achieve?
- Answers “because of this program Jennifer is now...”

This does NOT look like:

- A generic ending of “...and Jennifer received services.”
That’s only the beginning of the impact story.



Connect to an Outcome

Link the celebration to a data point. How does this impact relate to a program outcome?

This looks like:

- Tie the “what then” of the impact story and the broader program impact to a specific data point on the GRF.
- “Like Jennifer, 74% of our program participants entered Kindergarten last school year ready to excel.”

This does NOT look like:

- New data that is not reported to United Way.
- Should not include the participant count as the data point.



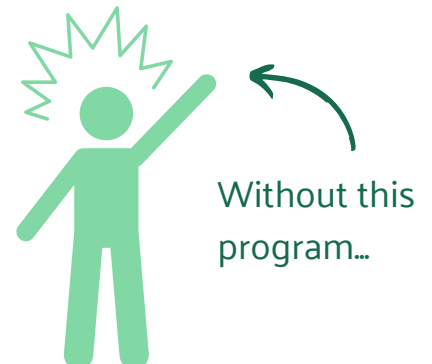
Create Urgency

We’re still not done yet! Create a sense of urgency.

This looks like:

- What would go away in our community if your program were to no longer exist?
- Why are programs like this critical in our community?

Answering questions like these allows the audience to see the true impact of their donation.



Publicity Guidelines

United Way Logo Use

Clear Space

Keep the logo clear of competing text, images and graphics by maintaining a minimum amount of clear space, equal to the height of “U” of the logo on all sides.



Minimum Size

For optimal legibility of the horizontal logo, use a width of at least 2” for print and 200px for digital when possible and a minimum width of 1” or 100px.



Full-Color (Preferred)

The full-color version of the logo is preferred. Do not adjust the colors of the logo symbol in any way. The United Way logotype is blue unless there is low contrast, in which case it should be in white.

Full-Color



Knockout (White)

The knockout version is for use on dark backgrounds or photographs where the full-color logo will not work.

Knockout (White)



One-Color Version (Black)

The one-color version is for use in applications where full-color or knockout logos would not provide sufficient contrast.

One-Color (Black)



Publicity Guidelines

United Way Logo Use

Logo Don'ts

United Way's logo is the most recognizable representation of the brand. As such, it may not be altered under any circumstances.

Here are some examples of things to avoid:

1. Don't rotate the logo
2. Don't change the logo's colors
3. Don't crop the logo
4. Don't skew, distort, or stretch the logo
5. Don't reconfigure or change the logo elements
6. Don't add artistic effects to the logo
7. Don't use translucency
8. Don't integrate the logo into messaging (i.e.: replace an "O" with the logo)
9. Don't use the logo as copy in a sentence

1. Don't rotate



2. Don't change colors



3. Don't crop



4. Don't skew/distort/stretch



5. Don't reconfigure



7. Don't add effects



8. Don't use translucency



9. Don't integrate into messaging



10. Don't use as copy

Through our global network spanning 34 countries and 1,100 communities,  connects partners, donors, volunteers, and community leaders...

Publicity Guidelines

Elevating Our Messaging, Together

United Way of Southeastern Connecticut

- **List your organization**, address, description, and link **on United Way's website** (review uwsect.org annually and provide needed updates).
- **Recognize United Way Partner Programs at special events** including the Community Celebration and Campaign Coordinator training.
- Mobilize volunteers for United Way **Day of Caring** volunteer projects at your organization (funded grant opportunities and simple volunteer days).
- **Feature your program's impact stories** on United Way's social media pages.
- **Elevate your trainings, workshops, info-sessions**, etc. amongst United Way partners.
- United Way promotes and elevates funded programs and fundraises to benefit all Partner Programs.

Partner Organization

Mentioning United Way by Name

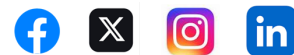
- Use our **full name**: United Way of Southeastern Connecticut
- There is **no "The..."** at the beginning of our name.
- In a sentence, it's simply "our organization receives funding from United Way of Southeastern Connect."
- First use our full name, then you may abbreviate to "UWSECT" afterwards. For example, "our organization has received funds from United Way of Southeastern Connecticut for seven years. Our Partnership with UWSECT has..."

Advertising & Press Materials

- Mention United Way of Southeastern Connecticut (using our complete name) **as a funding source in publicity and press materials** related to the funded program(s) and/or insert United Way's logo.
- Example language: "Funding for [name of program] has been provided, in part, by United Way of Southeastern Connecticut."

Social Media

- Recognize, share, tag, and re-post United Way on social media when appropriate.
- Include United Way when sharing impact stories when appropriate.



@unitedwaysect

Website

- Display **United Way's logo on your agency's website** > linking to www.uwsect.org
- **Link to CT 2-1-1** on your organization's website www.211ct.org
- Review CT 2-1-1 program information annually and/or make updates as needed

Physical Program Locations

- Use **United Way window clings** (provided) or sign:
 - At the entrance of your agency
 - At each site where Partner Programs operate



Electronic Funds Transfer (EFT) Form

For Organizations not currently receiving EFT payment from UWSECT. This form must be completed and returned with the signed Partner Program Agreement. Complete this form only once or when bank information changes. It is not needed annually.

Field	Organization Information
Organization Name	
Legal Address	
Financial Office Contact	
Financial Office Phone	
Financial Office Email	
Bank Name	
Bank Address	
Bank Routing Number	
Bank Account Number	
Type of Account	<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Other
Bank Contact	

Please include a void check or other bank documents to assure the correctness of the bank information. Return this form with the signed Partner Program Agreement.

Partner Program Agreement

By signing below, you acknowledge the **review and agreement** of all requirements as outlined in United Way of Southeastern Connecticut's Allocation Award Letter and Partner Program Agreement. **This agreement must be signed and returned to United Way no later than July 10 or your first payment will be withheld until the document is returned.**

Organization Name

Executive Director / CEO's Name

Signature

Date

Board of Director's Chair Name

Signature

Date