

Partner Memorandum of Agreement

July 1, 2022 – June 30, 2025

This Partner Memorandum of Agreement (PMOA) defines the cooperative and mutually beneficial relationship between United Way of Southwest Michigan (UWSM) and its Impact Partners. Both organizations understand that this a voluntary relationship requiring teamwork, understanding, and cooperation for the benefit of Berrien, Cass, and Van Buren counties.

Allocation

UWSM agrees to fund the programs/projects listed below:

- Program/Project:
- Organization:
- Impact Area:
- Issue:
- Strategy:
- Annual Allocation:
- Outputs/Outcomes/Indicators:
- Caveats or Contingencies:

UWSM will:

- Inform the community about the positive impact of the entire UWSM network of Impact Partners through a comprehensive communications and marketing program
- Conduct an annual community-wide fundraising campaign and to support work outlined in the 2022-2025 Agenda for Change
- Recognize the responsibility and authority of each Impact Partner, through its governing Board of Directors, to determine its own policies and manage its own work
- Provide periodic training and other capacity building opportunities
- Utilize trained volunteers and staff, who sign a conflict of interest and confidentiality statement, to make and monitor funding decisions
- Accept donor designations to eligible Impact Partners
- Align all investments with the issues, strategies, and indicators listed in the 2022-2025 Agenda for Change
- Apply to the State Employee Combined Campaign (SECC) on behalf of each applicable Impact Partner
- Adjust allocations during the funding cycle, if applicable
- Provide access to and training for e-CImpact
- Disburse one-twelfth of the allocation electronically, on a monthly basis, throughout the duration of the funding cycle, to the financial institution of choice, unless other arrangements are made for project-based funding
- Provide accommodations to Impact Partners as needed

Impact Partners will:

- Maintain up-to-date contact information, including changes in executive and program level staff, for the organization with UWSM staff
- Fulfill all PMOA expectations
- Comply with and support all applicable laws concerning unlawful discrimination, and have a written policy (that they will provide to UWSM) that is in compliance with such laws
- Have an organizational equity statement (that they will provide to UWSM), or develop and adopt one by July 1, 2023
- Not affiliate with a coordinated, community-wide fundraising campaign that competes with UWSM
- Support UWSM co-marketing efforts by displaying the UWSM logo in all locations and on all digital, written, or printed materials related to the funded program/project
- Submit timely and complete progress reports
- Participate in Impact Partner meetings coordinated by UWSM
- Ensure timely filing and renewal of all relevant organizational documents, including Solicitation Registration and 990
- Ensure that staff have the access and knowledge needed to submit progress reports through e-ClImpact
- Maintain a responsible governing board or local advisory group
- Measure and report on the outputs/outcomes/indicators listed in this PMOA
- Notify UWSM prior to making any changes with outputs/outcomes/indicators listed in this PMOA
- Keep comprehensive and accurate financial records that conform to basic accounting principles and financial reporting requirements, and have these records audited or reviewed annually by and independent CPA
- Complete and submit a Counterterrorism Compliance Form at the beginning of the funding cycle, in compliance with United Way Worldwide requirements
- Use the UWSM allocation exclusively for the programs/projects listed in this PMOA
- Notify UWSM of an impending merger with or acquisition of another organization

Impact Partners should:

- Run a UWSM fundraising campaign with their staff and board
- Maintain up-to-date information in 2-1-1, UWSM's online information and referral system
- List volunteer opportunities in Volunteer United, UWSM's online volunteer engagement system
- Participate in 3rd party evaluation projects, upon request
- Participate in training opportunities provided by or recommended by UWSM
- Provide speakers for UWSM events and activities
- Host virtual or in-person tours of the organization and the program/project that is funded
- Provide volunteer opportunities for UWSM donors and other constituents



Conditions

- Signing this agreement indicates acknowledgement and acceptance of all outlined terms.
- UWSM reserves the right to change the terms of this agreement at any time. Changes to the PMOA must be approved by the Impact Cabinet, and will be shared with Impact Partners in writing, unless prior accommodations have been made.
- UWSM or an Impact Partner may terminate the funding relationship at any point during the funding cycle, with cause. The UWSM Board of Directors will afford due process to an Impact Partner. If funding is terminated, any unused funds must be returned, and funds that are balance due upon termination will be forfeited.

Impact Partner/Organization Name

_____	_____	_____
Impact Partner Board Chair Signature	Impact Partner Board Chair Printed Name	Date

_____	_____	_____
Executive Director Signature	Executive Director Printed Name	Date

United Way of Southwest Michigan

_____	_____
Zack East	Date
Board Chair, UWSM	

_____	_____
Anna Murphy,	Date
President & CEO, UWSM	

Appendix A - Reporting and Evaluation

Purpose of Evaluation

First and foremost, organizations should evaluate their work to determine if it is creating the intended results. It is UWSM's expectation that Impact Partners are using the results of their evaluations for process improvement purposes, and not simply to pacify our funding requirements.

UWSM strongly believes in being a good steward of donor dollars. To that end, Impact Partners will be held accountable for achieving the proposed level of progress on each identified output/outcome/indicator, as submitted during the funding application process.

Elements of Reporting

Impact Partners will complete progress reports every six months. By January 31st of each year in the funding cycle, the following information must be reported:

- Program/project narrative
- Success stories
- Contact information

By July 31st of each year in the funding cycle, the following information must be reported:

- Program/project narrative
- Success stories
- Progress toward outputs/outcomes/indicators
- Number served, including demographics (age, ZIP Code, gender identity, race/ethnicity)
- Organizational budget
- Program/project budget
- Leveraged dollars
- Contact information

In addition, there are certain organizational documents that Impact Partners must provide on an annual basis. These include:

- Board roster, with names and contact information, in Microsoft Excel format
- Organizations with a budget of \$500,000 or greater must submit an audited financial statement prepared by an independent CPA
- Organizations with a budget less than \$500,000 must submit a financial statement that is either reviewed or audited by an independent CPA
- Form 990, 990-N, or 990-EZ (whichever is applicable to your organization)
- Current Solicitation Registration

Confidentiality and Data Sharing

- All data submitted to UWSM during the application and progress reporting process are considered the property of UWSM.
- UWSM reserves the right to aggregate Impact Partner data with other partners measuring the same outputs/outcomes/indicators, and to use this data in whatever communication strategies we see fit.
- UWSM will not publicly share data from a single Impact Partner in isolation.

- Individual client confidentiality is protected, and UWSM will NEVER disclose a client's name or photo without prior consent and approval from both the client and the Impact Partner.

e-CImpact

- Progress reports will be submitted through an online data management system called e-CImpact.
- Impact Partners will ensure that staff have the access and knowledge needed to submit these reports. Training and support for e-CImpact will be provided as needed.

Reporting Deadlines

- Progress reports for the period of January 1st through June 30th are due by July 31st of each year of the funding cycle.
- Progress reports for the period of July 1st through December 31st are due by January 31st of each year of the funding cycle.
- No extensions of the deadline(s) will be granted for reports.
- Programs/projects that do not have their report completed by 11:59 pm on the due date will forfeit their allocation for the following month.
- Please be aware that UWSM staff will only be available for e-CImpact support from 8:30 am to 5:00 pm on weekdays (Monday through Friday, excluding holidays).
- If the report is more than one week late, the program/project will forfeit its allocation for an additional month.
- Programs will continue to forfeit one month's allocation for every week the report is late.
- UWSM reserves the right to automatically terminate funding for any program/project that is four weeks delinquent with reporting.

Revisions and Changes

- If an Impact Partner wants to revise outcomes or measurement tools listed in this PMOA, they must first seek approval from UWSM.
- Failure to do so could put the program/project into Monitoring and Support.

Evaluation Process

- Funding recommendations and progress report reviews are completed by groups of volunteers called "Investment Teams". There are eight Investment Teams, one for each issue listed in the Agenda for Change.
- Feedback and requests for clarification developed during the review process will be communicated to Impact Partners, with deadlines included if follow-up is required from the organization.
- When significant concerns arise or persist in an organization, the Impact Partner will be placed on "Monitoring and Support."

Monitoring and Support

Reasons for Monitoring and Support

If UWSM staff and/or volunteers raise a concern about an Impact Partner, that organization may be placed on Monitoring and Support. Reasons for concerns include, but are not limited to:

- Concerns about program/project quality and/or effectiveness.

- Financial concerns that cause an organization to receive unsatisfactory annual financial reviews or audits.
- Financial concerns that threaten the organization's ability to continue to deliver the program/project.
- Significant changes to the program/project that affects the scope of work, design, quality of services, and/or measurement of outputs/outcomes/indicators.
- Failure to meet responsibilities outlined in the PMOA.
- Submitting incomplete, inadequate, and/or inaccurate reports.
- Breach of federal, state, or local laws.

Process for Monitoring and Support

- If a concern is identified, UWSM will contact the organization to clarify the issue.
- If this does not resolve the concern, the UWSM Impact Cabinet will place the organization on Monitoring and Support.
- UWSM staff and volunteers will then work with the Impact Partner to determine what a successful resolution to the concern would be, and identify a reasonable timeline for resolution. These decisions will be added to the PMOA as caveats or contingencies.
- If the caveats or contingencies are resolved, the organization will be taken off of Monitoring and Support.
- If the caveats or contingencies are not met, the Impact Cabinet will determine further actions, which may include reduction or termination of funding.

Change in Funding Amount or Status

UWSM may change the funding amount or terminate the funding relationship at any point during the funding cycle, with cause.

Reasons for Change in Funding Amount or Status

Causes for UWSM to reduce or terminate funding may include, but are not limited to, the following:

- An Impact Partner ceases operations, or the program/project for which an organization is receiving funding is no longer in operation.
- An Impact Partner is not successful in resolving Monitoring and Support issues.

Process to Change Funding Amount or Status

- The decision to reduce or terminate funding for an Impact Partner must be made by the UWSM Impact Cabinet and approved by the UWSM Board of Directors.
- Once this decision is made, UWSM staff and a representative of the Impact Cabinet will inform the Impact Partner of this decision both in person and in writing.
- Following this notification, the monthly allocation will be lowered or stopped accordingly. Any unused funds must be returned, and funds that are balance due upon termination will be forfeited.
- Forfeited funds will be transferred back to the Community Impact Fund. These funds must be used by UWSM to support other programs/projects that align with the Agenda for Change, and cannot be used to support general operational costs of UWSM.
- If the funding is terminated:
 - A final progress report will still be required.
 - Designations will continue to be honored throughout the remaining calendar year. The program/project that is defunded will not be eligible to receive designations in subsequent years of the funding cycle.



- UWSM will cease to reference the program/project that is defunded in all future communications.
- The Impact Partner will cease to reference UWSM as a funder of the program/project that is defunded.
- UWSM can immediately terminate a funding relationship if a Funded Partner loses its exemption from federal income taxation under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended.

Appendix B – Details and Definitions

Allocation Adjustments

- Throughout the funding cycle, funding will be reviewed annually, and may be increased or decreased based on fund-raising results and collections. All allocation adjustments will require approval by UWSM’s Board of Directors. A yearly application process will not be required.
- Allocation Increases:
 - If UWSM significantly surpasses its community fundraising goal, there is potential for Impact Partners to receive an increase in their allocation amount.
 - Increases will be dispersed in an equitable manner, based on current allocation amounts and a proportionate formula determined by the UWSM Board of Directors.
 - Organizations must be “in good standing” to be eligible for increases, meaning that they are meeting all obligations and responsibilities outlined in this document. UWSM volunteers (Investment Teams, Impact Cabinet, Board of Directors) will determine “in good standing” status for all organizations, based on adherence to obligations stated in PMOA.
 - Allocation increases must apply to the program/project funded by UWSM, as identified in this document. If for some reason the organization cannot use or does not need additional funds for said program(s), UWSM is to be notified immediately.
- Allocation Decreases:
 - If UWSM does not reach its community fundraising goal, there is potential for Impact Partners to receive a decrease in their allocation amount.
 - Decreases will be dispersed in an equitable manner, based on current allocation amounts and a proportionate formula determined by the UWSM Board of Directors.
 - If the allocation reduction puts the long-term viability of the program/project funded by UWSM at significant risk, UWSM is to be notified immediately.

Caveats and Contingencies

- Caveats are defined as stipulations that dictate how funding is or is not to be used. Contingencies are defined as issues or concerns that are raised about one or more of the programs/projects, or about the organization’s capacity.
- Caveats and contingencies may be issued at any point during the funding period or the application process. Often, contingencies will need to be resolved before the funding will be awarded.
- The desire to issue caveats or contingencies may be initiated by UWSM staff and/or volunteer members of the Investment Teams, Impact Cabinet, or Board of Directors. Organizations will be notified of caveats and contingencies and will work with UWSM staff and volunteers to develop expectations for how to resolve them.

Co-Marketing

The UWSM logo (electronic files will be provided) must be present or UWSM must be mentioned in the following ways:

- UWSM will provide window clings to be displayed in the places of operation visited by clients where the funded program/project takes place

- Collateral/printed materials for the funded program/project, such as newsletters, brochures, etc.
- Identification on organization's website and link to www.uwsm.org
- Listings of organization and program/project funders, including Annual Report
- Press releases about the funded program/project

Designations

- UWSM's donors can designate their gift to the program/project of their choice. These designations are honored above and beyond the UWSM allocation and must be used only for the specified program/project.
- Impact Partners will receive designations on a quarterly basis, less uncollectible pledges and board-approved processing fee, in compliance with United Way Worldwide's Standard M requirements.
- Designation reports will not be sent to the Impact Partners but will be available to access through Andar.
- If an Impact Partner runs a United Way campaign, they will promote the concept of undesignated giving, and will not solicit their board or staff to designate their gift to one of their programs/projects. If an employee gift is self-designated, it will not be honored, but will be directed to the Community Impact Fund.
- UWSM reserves the right to withhold and forfeit the distribution of designations due to programmatic or financial impropriety or failure to comply with the terms of this agreement until the issue(s) is resolved to the satisfaction of UWSM.

Mergers and Acquisitions

- Impact Partners will notify UWSM of an impending merger with or acquisition of another organization.
- To ensure that the program/project funded by UWSM will continue to fulfill the expectations set during the funding application process, UWSM staff and/or volunteer members of the Investment Teams, Impact Cabinet, or Board of Directors may require that organizational and/or financial documentation be provided.
- UWSM reserves the right to reduce or terminate funding if a merger or acquisition will negatively impact the program/project that receives funding.

Running a UWSM Campaign

- Impact Partners have the opportunity to run a UWSM campaign with their staff and Board members.
- If they do, they cannot use it as an opportunity to promote designations back to their own program/project. If an employee gift is self-designated, it will not be honored, and will be directed to the Community Impact Fund.

State Employee Combined Campaign (SECC)

- UWSM participates as local federation in the SECC, an annual workplace fundraising drive that gives state employees the chance to donate to organizations of their choice.

- To be eligible for the SECC, UWSM must have an Impact Partner's current Solicitation Registration and 990 on file. A delay in providing these will prohibit an organization from being included in the SECC.

Statement of Principle Regarding Justice, Equity, Diversity, and Inclusion

UWSM has adopted a Statement of Principle regarding justice, equity, diversity, and inclusion. The full statement can be found on the UWSM website at www.uwsm.org/agenda. A brief excerpt regarding equity is shared below.

UWSM recognizes that Equity is the core value of our work that is critical in achieving United Way's mission. We value the sense of belonging for everyone in our communities. From our engagement with donors to our investment of resources across our communities and in our interactions with the public, together we will create thriving communities for all. We will actively work to dismantle systemic, institutional, and historical barriers based on, but not limited to, race, gender, sexual orientation, gender identity, gender expression, disability, religion, income class, age, so they no longer determine socioeconomic, education, and health outcomes.

In all levels of staff and governance, United Way of Southwest Michigan employs and promotes individuals, recruits volunteers, and partners with programs that inclusively support the diversity of our local community.

It is our aim, therefore, that Southwest Michigan become a more equitable community and that United Way Southwest Michigan's strategies, investments, and partners be directed toward this end. Equity is at the heart of what it means to live united and advance the common good; to be an equitable system is fundamental to achieving our mission and goals in education, financial stability, health, and basic needs.