



United Way of Greater Milwaukee & Waukesha County

COLLABORATION AGREEMENT

***DRAFT PENDING UNITED WAY
BOARD APPROVAL***

Updated: September 11, 2025

TABLE OF CONTENTS

Click on the item below to go directly to that section. To return to the Table of Contents, click on the hyperlink in the footer of this document.

United Way Collaboration Agreement.....	3
Introduction	3
Collaboration Agreement	4
Policy on Late, Incomplete or False Reports	6
Changes or termination of this Agreement.....	7
Addendum A – Safe & Stable Homes	8
Data Collection Requirements	8
Reporting Guidelines	10
Safe & Stable Homes Initiative Timeline	10
Addendum A – Techquity	12
Data Collection Requirements	12
Reporting Guidelines	13
Techquity Initiative Timeline	14
Addendum A – Reducing Barriers to Employment & Advancement.....	15
Data Collection Requirements	15
Reporting Guidelines	16
RBEA Initiative Timeline.....	17
Addendum A – Teen Mental Wellness: Empowering Minds.....	18
Data Collection Requirements	18
Reporting Guidelines	19
Teen Mental Wellness: Empowering Minds Timeline	19
Addendum A – Community Resiliency & Legacy.....	21
Data Collection Requirements	21
Reporting Guidelines	22
Community Resiliency & Legacy Timeline	22
Addendum B Eligibility & Organization Standards.....	23
Eligibility Requirements.....	23
Organization Standards	23
Financial Reporting	24
Addendum C Funding Process.....	25
Addendum D Donor Designation Distribution Process	26

Understanding Donor Designations	26
Addendum E Supplemental Fundraising Policy/Blackout Period.....	29
Addendum F Supporting United Way's Community Campaign	31
Hosting a United Way Campaign	31
Speakers Bureau	31
Serving on United Way's Campaign Cabinet	32
Addendum G Mandated Reporter Training & Policy on Protecting Children	34
Mandated Reporter Training Guidelines	34
Policy on Protecting Children	35
Addendum H Volunteer Engagement	36
Addendum I Co-branding & Logo Usage Guidelines	37
Addendum J Cyber Security	39
Addendum K – Signature Pages.....	41
Non-discrimination Policy.....	41
Notification Policy.....	42
Collaboration Agreement Signature Page.....	43

UNITED WAY COLLABORATION AGREEMENT

INTRODUCTION

United Way of Greater Milwaukee & Waukesha County (United Way) would like to extend our congratulations on being selected as a funded organization and collaboration partner! We are excited to work in partnership with you in addressing some of our community's biggest challenges with sustainable solutions.

Your organization has demonstrated that it can help us advance the work of our key initiatives, build community resilience, and support former collective impact efforts through legacy strategies – the tenets of United Way's impact-based funding investments.

Through impact-based funding, United Way has a goal to move the needle sooner on the issues that are impacting our community. We believe that your organization along with all the other organizations we are funding will help us get there. Thank you.

The collaboration standards outlined in this agreement reflect the values that characterize United Way and the expectations for any organization United Way may fund.

United Way of Greater Milwaukee & Waukesha County Values:

Collaboration

We believe in the power of working together with businesses, nonprofits, government, and community members to achieve meaningful and lasting impact.

Integrity

We are committed to transparency, accountability, and ethical practices in all that we do, building trust with our partners, donors, and community.

Compassion

We approach our work with empathy, understanding, and a commitment to supporting those in our community who face challenges.

Inclusion

We are not succeeding unless our success impacts our entire community. Every person in our community deserves support and all have something to give.

We hope you will find the collaboration standards a clear representation of our expectations we hold of ourselves and of you as our partner. It is our goal to work together to achieve the greatest impact in our community. These standards are also designed to assure donors that United Way investments are administered efficiently, funded organizations are financially accountable and are effectively governed by a volunteer Board of Directors or equivalent.

Funded Organization Benefits

United Way is pleased to offer the following benefits to funded organizations beyond our financial investments.

1. Promotion by United Way and inclusion in United Way materials

2. Inclusion of funded organization volunteer opportunities through our year-round volunteer database and access to in-kind supplies, kits, and other resources designed to help your organization.
3. A level of trust and efficacy to agencies and business partners through their association with United Way of Greater Milwaukee & Waukesha County.
4. Eligibility to receive donor designations without an administrative fee.
5. Inclusion in United Way-sponsored programs including workshops, networking, and newsletters.
6. Opportunities to inform United Way's policy priorities and engage in policy-related efforts that advance your work and our key initiative goals.
7. Use of funds for general operating expenses intended to be used where the organization needs them most.
 - a. Funded organizations do not have to return unspent funds at the end of the grant as long as the organization is not in violation of any terms in this agreement or the addendums.

COLLABORATION AGREEMENT

The following section outlines the terms that United Way and funded organizations agree to by signing the agreement. The subsequent addenda go into additional detail about these terms where applicable. If you have any questions about the contents of this agreement or it's addenda, please contact your Impact Manager or Gerald Coon, Director of Key Initiatives, gcoon@unitedwaygmwc.org

United Way agrees to:

1. Work with community partners to improve and positively impact community conditions by deepening collective impact efforts in our community by guiding the overall vision and strategy, managing shared measurements, and mobilizing resources.
2. Inform funded organizations about upcoming events/activities/deadlines in a timely manner.
3. Conduct a communitywide campaign to raise funds annually to support Greater Milwaukee & Waukesha County's nonprofit organizations.
4. Respect and maintain the confidential nature of certain information provided by the funded organization.
5. Distribute unrestricted funding to the funded organization monthly via ACH throughout the term of this agreement.
 - a. ACH transfers will be made around the 15th of each month and will show up on your statement from UWWIMILWAUKEE.
6. Honor multi-year funding commitments to the best of our ability. Inform organization leader, as soon as possible, if we anticipate a reduction of funding. ([See Addendum C](#))
7. Provide an annual grant award letter, listing total fiscal year grant amount and any changes to the collaboration agreement, to funded organization throughout the term of this agreement.
8. List funded organizations in United Way materials and share outcomes with donors and the community.
9. Provide support services aimed at improving efficiency and increasing the capacity of the social service system to respond to community problems.
10. Accept campaign contributions that are designated to the funded organization and distribute as described on attached addendum. ([See Addendum D](#))

11. Solicit the input, concerns, and reactions from the funded organization that would be affected by a proposed change in policy or operating procedure.
12. Address any questions concerning the funding process.
13. Provide funded organizations with constructive feedback to improve their outcomes.

Funded Organization agrees to:

1. Be an active partner in a collective impact model including attending all meetings, participating in discussions, and submitting required documents or reports or otherwise sharing data as required by established deadlines. Such submissions shall be in the form prescribed by United Way. Failure to meet these requirements may result in withheld funding until requirements are completed and may impact future funding. (See Addendum A)
2. Meet all data collection requirements of the key initiative strategies and participate in reviews of performance, budget, and other deliverables as requested. (See Addendum A)
3. Make a reasonable effort to collect required demographics on all unduplicated participants served in the prescribed format, asking all required questions. (See Addendum A)
4. Maintain United Way eligibility requirements and organizational standards. ([See Addendum B](#))
5. Understand that multi-year funding commitments are dependent on United Way's ability to raise unrestricted and key initiative directed funds through the annual campaign. United Way will make every effort to honor all multi-year funding commitments, however, if necessary, will communicate anticipated changes to the funding commitment as soon as possible, no later than June 1st of each year for the next funding year starting July 1st. ([See Addendum C](#))
6. Contribute to United Way's campaign success by positively endorsing United Way throughout the year and by limiting fundraising to activities that are not competitive with the United Way campaign from September 1 through October 31. Examples of competitive fundraising would include a workplace solicitation, online/social media solicitation, direct mail appeals, direct solicitation for donor designations to your organization, or direct corporate solicitation. ([See Addendum E](#))
7. Not make requests of United Way to sponsor or purchase tickets to fundraisers and events.
8. Acknowledge and promote United Way's partnership to staff, volunteers, and the public. Assist in United Way's fundraising campaign by encouraging support via organization communication channels (newsletters, etc.); encouraging board, staff, and volunteers to participate through their companies; neither encouraging nor discouraging designations; participating in campaign presentations; and offering tours of the organization if requested and possible. ([See Addendum F](#))
9. Hold an active workplace campaign on behalf of United Way. ([See Addendum F](#))
10. Encourage qualified staff to participate in United Way's campaign cabinet during the annual community campaign when requested. ([See Addendum F](#))
11. Encourage qualified staff to participate in United Way's Speakers Bureau during the annual community campaign. All speakers must attend United Way Speakers Bureau training. ([See Addendum F](#))
12. Complete mandated reporter training if a funded organization is a youth-serving organization. Funded organizations serving children and youth in any capacity must complete mandated reporter training and have in place a separate policy regarding the protection of children and youth. ([See Addendum G](#))

13. Partner with United Way's Volunteer Engagement Division by hosting or participating in volunteer opportunities that support your organization and align with United Way funding priorities, including key initiatives. ([See Addendum H](#))
14. Use the United Way logo in a manner consistent with United Way Worldwide's Licensure Agreement on locally produced printed materials, letterheads, publications, and at public functions. ([See Addendum I](#))
15. Adhere to required cyber security practices. ([See Addendum J](#))
16. Ensure organization has a profile on Candid (formerly known as GuideStar).
17. Adhere to and sign United Way's Non-discrimination Policy. ([See Addendum K](#))
18. Notify United Way within 24 hours if any legal, criminal or evidence of criminal activities, accreditation or safety issues arise. ([See Addendum K](#))
19. Certify that all funds and donations will be used in compliance with all applicable counterterrorism financing and asset control laws, statutes, and executive orders.
20. Have a board-approved whistleblower policy that all organization staff and board/committees review upon hire and annually thereafter. If the organization does not currently have a board approved whistleblower policy, they agree to have one in place within 12 months of the start of this agreement.
21. Allow United Way to audit records to provide verification of information reported.
22. Protect, defend, indemnify, and hold harmless United Way and its agents, officers, and employees from all claims and suits including court costs, attorney fees, and other expenses caused by any act or omission of the funded organization and/or its subcontractors and employees.
23. Understand that not meeting the criteria described within this Agreement may include the return of funds or make your organization ineligible for future funding.

Both Funded Organization and United Way agree to:

1. Have open communication and notify each other of significant changes in programs, plans, relevant staffing, or operations.
2. Be fiscally responsible and uphold high standards of accountability. This includes maintaining 501(c)(3) exemption requirements and using Generally Accepted Accounting Practices (GAAP).
3. Work cooperatively with other community organizations through a collective impact approach including:
 - a. Using data to inform and adapt strategies, insuring continuous improvement across strategies,
 - b. Coordinating and aligning across sectors in a supportive way whenever possible,
 - c. Frequent open dialogue that builds trust, respect, and inclusion.
 - d. Sharing insights, learnings, and updates intended to maintain momentum and keep everyone informed.
4. Respect for autonomy and the inherent rights and responsibilities of each other's boards of directors.
5. Responsive communication, with a goal of responding within 3 business days whenever possible.

POLICY ON LATE, INCOMPLETE OR FALSE REPORTS

Funded organizations must observe United Way deadlines to allow adequate time for staff members to properly review and evaluate reports.

Late or incomplete reports may impact future funding. Late reports may result in held or forfeited monthly allocations. Late or incomplete report penalties may be waived for “good cause” reasons (medical, accident involvement, death, loss, or unavailability of records due to fire, flood, theft, or similar reason).

Any misrepresentation or false information in the funded organization or reporting to United Way may void this Agreement and funds paid by United Way to the organization may need to be returned to United Way.

CHANGES OR TERMINATION OF THIS AGREEMENT

1. If, at any time during the period of this Agreement, it becomes necessary to change the terms of this Agreement, such changes once agreed upon shall be effective when signed and incorporated in written amendments to the Agreement.
2. The funded organization or United Way may terminate this Agreement on sixty (60) days written notice. A funded organization’s written decision to terminate must include the organization’s board chair on the communication. United Way funding will cease on the effective date of termination and may, in some circumstances, require reimbursement of funds from the funded organization.

ADDENDUM A - SAFE & STABLE HOMES

The Safe & Stable Homes: Ending Family Homelessness (SASH) initiative is a collective impact model that aims to support a homelessness system where family homelessness is prevented whenever possible, and when it cannot be prevented, moving households out of homelessness quickly with wraparound supportive services. Through this collective impact model, we're working together to ensure families are stably housed.

We view each funded organization as a key partner in this work. As part of the Safe & Stable Homes network, funded organizations are encouraged to take an active role in shared data collection, participate in bi-annual roundtables, and engage in mutually reinforcing activities that drive progress toward our shared goal.

The term of this grant is one year from July 1, 2026, through June 30, 2027. Our goal - sustain the end of family homelessness in our four-county footprint.

To support this effort, we ask that funded organizations:

- Make every effort to collect key demographic information from all participants involved in program activities that lead to the Safe & Stable Homes goal of preventing homelessness whenever possible, and when homelessness cannot be prevented, moving households out of homelessness quickly and with wraparound supportive services.
- Participate in a site visit during the grant period.
- Submit both a mid-year and year-end report.
- Attend a fall summit and spring grantee roundtable.

We're excited to partner with you and look forward to the impact we can make together for our communities.

We're here to support you in meeting all grant requirements. If anything is missed, funding may be paused until things are back on track, and it may influence consideration for future funding.

DATA COLLECTION REQUIREMENTS

All funded organizations are required to report unduplicated demographic information for all participants served using the categories listed below.

Required demographics:

- **Age Groups:** 0-3, 4-5, 6-11, 12-17, 18-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95 and older
- **Gender:** Male, Female, Transgender, Non-binary/Genderfluid/Prefer to self-describe, Prefer not to say (Please note that Non-binary/Genderfluid/Prefer to self-describe is one category)
- **Household Income:** \$0 to \$9,999, \$10,000 to \$14,999, \$15,000 to \$24,999, \$25,000 to \$34,999, \$35,000 to \$44,999, \$45,000 to \$54,999, \$55,000 to \$64,999, \$65,000 to \$74,999, \$75,000 to \$84,999, \$85,000 to \$89,999, \$90,000 or more, Free and reduced lunch (if income data is not available)

- **Racial Background:** African American/Black (not Hispanic or Latino), Asian (not Hispanic or Latino), Caucasian/White (not Hispanic or Latino), Hispanic/Latino, Hmong/Laotian (not Hispanic or Latino), Middle Eastern (not Hispanic or Latino), Native American (not Hispanic or Latino), Native Hawaiian/Pacific Islander (not Hispanic or Latino), Multi-racial, Other
- **ZIP Code:** All zip codes in Milwaukee, Washington, Ozaukee, or Waukesha, Outside of four-county area, or currently experiencing homelessness.

Required Outcomes

Organizations awarded a grant through Safe & Stable Homes will be asked to report back on results from the aligned metric options identified in the letter of intent. The outcome and aligned metrics for each strategy area are listed below.

Array of shelter & housing support

Key outcome

Homelessness is a rare and brief experience

Aligned metrics

of households accepted into emergency shelter or transitional housing programs by the funded organization

of households accepted into Rapid Rehousing or Permanent Supportive Housing programs by the funded organization

of households exited from funded organization into permanent housing destinations

of local coalition staffing calls the funded organization attended to align current queue of participants needing shelter/housing with best match of services within current availability

Average length of time families experienced homelessness between the point of entry into funded organization and the point of exit into permanent housing.

Flexible Financial Assistance

Key outcome

Homelessness is prevented whenever possible

Aligned metrics

Average dollar amount distributed to families to prevent homeless episodes

of households that indicated that an eviction or foreclosure was prevented due to financial assistance received

Homeless System Infrastructure & Housing Navigation

Key outcome

Homelessness is prevented whenever possible

Aligned metrics

of households the program assessed as needing homelessness prevention resources

of prevention and diversion resources the funded organization has in their database of referral resources

Key outcome

Homelessness is a rare and brief experience

Aligned metrics

of Category 1 participants assessed by Coordinated Entry staff

of Category 1 participants connected to emergency shelter, housing program, or other

resource that ends their experience of street homelessness
 # of local coalition staffing calls the funded organization attended to align current queue of participants needing shelter/housing with best match of services within current availability

Legal Assistance for Eviction Cases

Key outcome

Homelessness is prevented whenever possible

Aligned Metrics

of participants receiving legal assistance or tenant/landlord mediation
 # of participants receiving eviction prevention resource referrals
 # of participants that received a direct/warm connection to another resource outside of the funded Safe & Stable Homes program

Wraparound Supportive Services

Key outcome

Households do not experience repeated episodes of homelessness.

Aligned Metrics

of households offered case management
 # of households provided tailored childcare support
 # of households that received financial coaching
 # of households that received life skills workshops or coaching

Household Budget Support & Financial Counseling

Key outcome

Homelessness is prevented whenever possible

Aligned metrics

of households that stayed in their home due to foreclosure prevention assistance

Key outcome

Households do not experience repeated episodes of homelessness.

Aligned metrics

of families that received financial counseling to improve their household's financial situation
 # of households that participated in homebuyer counseling

REPORTING GUIDELINES

Submission of a mid-year and year-end report using the e-CImpact online reporting system will be required from all funded organizations.

Approximately one month prior to mid-year and year-end report due dates, funded organizations will receive an email from United Way staff with directions on how to access reports in e-CImpact.

SAFE & STABLE HOMES INITIATIVE TIMELINE

- **June 1, 2026:** Applicants are notified of award status and are given Collaboration Agreement for review and signatures.
- **July 1, 2026:** Funded organizations are notified of award amount, funding year begins

- **July 1, 2026:** Signed Collaboration Agreement uploaded into e-CImpact
- **July 15, 2026:** First monthly grant award payment made via ACH.
 - Grant award payments are made monthly around the 15th of the month for the duration of the fiscal year. Organizations may request a different payment schedule for special circumstances.
- **August – December 2026:** Site visits
- **August 27, 2026, 3:00-4:00:** Roundtable for SASH funded organizations
- **January 25, 2027:** Mid-year report due in e-CImpact by 4:30 pm
- **June 30, 2027:** Funding year ends
- **July 26, 2027:** Year-end report due in e-CImpact by 4:30 pm

Safe & Stable Homes Grant Contact:

Krystina Kohler, Impact Manager, Safe & Stable Homes
kkohler@unitedwaygmwc.org; 414.263.8181

ADDENDUM A - TECHQUITY

Techquity began during the COVID-19 pandemic as a means of emergency response and has since grown into a collaborative effort aimed at ensuring community members have access to devices and know how to use them to successfully navigate our digital economy. Through this collaborative model, we're working together to ensure the digital equity and inclusion of all residents in Milwaukee, Ozaukee, Washington, and Waukesha Counties.

To date, Techquity has partnered with over 50 different community-based organizations serving tens of thousands of individuals with no-cost computers and digital skills training services. Organizations funded through the Techquity initiative will continue to empower people through access to essential digital tools and skills training.

We view each funded organization as a partner in this work. As part of Techquity, funded organizations are encouraged to take an active role in shared data collection, participate in roundtables, and engage in mutually reinforcing activities that drive progress toward our shared goal.

The term of this grant is two years from July 1, 2026, through June 30, 2028. Our goal - We will provide 50,000 computers to people who need them across our four-county footprint. Techquity's secondary goal is to provide critical digital skills and literacy training to people who need them.

To support this effort, we ask that funded organizations:

- Make every effort to collect key demographic information from all participants involved in Techquity-supported activities.
- Verify that computers are being distributed only to participants meeting the Covered Population requirements.
- Participate in a site visit during the grant term.
- Submit a year-end report.
- Attend a distribution site and grantee roundtable.

We're excited to partner with you and look forward to the impact we can make together for our communities. We're here to support you in meeting all grant requirements. If anything is missed, funding may be paused until things are back on track, and it may influence consideration for future funding.

DATA COLLECTION REQUIREMENTS

All funded organizations are required to report unduplicated demographic information for all participants served using the categories listed below.

Required demographics:

- **Age Groups:** 0-3, 4-5, 6-11, 12-17, 18-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95 and older
- **Gender:** Male, Female, Transgender, Non-binary/Genderfluid/Prefer to self-describe, Prefer not to say (Please note that Non-binary/Genderfluid/Prefer to self-describe is one category)

- **Household Income:** \$0 to \$9,999, \$10,000 to \$14,999, \$15,000 to \$24,999, \$25,000 to \$34,999, \$35,000 to \$44,999, \$45,000 to \$54,999, \$55,000 to \$64,999, \$65,000 to \$74,999, \$75,000 to \$84,999, \$85,000 to \$89,999, \$90,000 or more, Free and reduced lunch (if income data is not available)
- **Racial Background:** African American/Black (not Hispanic or Latino), Asian (not Hispanic or Latino), Caucasian/White (not Hispanic or Latino), Hispanic/Latino, Hmong/Laotian (not Hispanic or Latino), Middle Eastern (not Hispanic or Latino), Native American (not Hispanic or Latino), Native Hawaiian/Pacific Islander (not Hispanic or Latino), Multi-racial, Other
- **ZIP Code:** All zip codes in Milwaukee, Washington, Ozaukee, or Waukesha, Outside of four-county area, or currently experiencing homelessness.

Required Outcomes

Organizations awarded a digital skills grant must demonstrate the impact the digital skills training had on their participants. Outcome data can be gathered via surveys, interviews, or other relevant means. United Way does not prescribe how this information is collected.

In the Year-End Report, funded organizations will be asked to report on the following:

- Number of participants enrolled in digital skills and literacy training that complete at least 80% of the training.
- Whether each eligible participant who did not own a personal computer was offered one (provided at no cost by the United Way) either during or upon completion of their skills training
- Whether each participant identifies as a member of one or more (8 total) Covered Population(s);
- All intended skills training sessions, classes, or other teaching activities were implemented as planned;
 - We understand that changes to training sessions, classes, or other activities happen. We ask funded organizations to seek United Way approval for any significant changes from what was described in the funding application.
- Positive impact of the digital skills training on their participants. This can be done by collecting information on each participant's goals and whether the goals were achieved upon completing training, participant feedback indicating that the skills training improved their skills in a specific area or generally, and/or what activities the new digital skills will help them with the most (e.g. applying for a job, finding housing, completing schoolwork, etc.)

REPORTING GUIDELINES

Submission of a year-end report using the e-CImpact online reporting system will be required from all funded organizations.

Approximately one month prior to year-end report due dates, funded organizations will receive an email from United Way staff with directions on how to access reports in e-CImpact.

TECHQUITY INITIATIVE TIMELINE

- **June 1, 2026:** Applicants are notified of award status and funded organizations are given Collaboration Agreement for review and signatures.
- **July 1, 2026:** Funded organizations are notified of award amount, funding year begins
- **July 1, 2026:** Signed Collaboration Agreement uploaded into e-CImpact
- **July 15, 2026:** First monthly grant award payment made via ACH.
 - Grant award payments are made monthly around the 15th of the month for the duration of the fiscal year. Organizations may request a different payment schedule for special circumstances.
- **August – December 2026:** Site visits
- **TBD:** Roundtable for Techquity funded organizations
- **June 1, 2027:** Funded organizations notified of next fiscal year timeline, any changes to the collaboration agreement, and asked for renewal signatures.
- **June 30, 2027:** Year 1 funding ends
- **July 1, 2027:** Year 2 award letter issued, signed collaboration agreement uploaded into e-CImpact
- **July 26, 2027:** Year-end report due in e-CImpact by 4:30 pm

Techquity Grant Contact

TBD

ADDENDUM A - REDUCING BARRIERS TO EMPLOYMENT & ADVANCEMENT

The RBEA initiative is a collaborative effort aimed at helping individuals across our four-county region overcome challenges to finding and growing in meaningful, stable careers. Through this collective impact model, we're working together to remove employment barriers and open new pathways for success. We view each funded organization as a key partner in this work.

As part of the RBEA network, funded organizations are encouraged to take an active role in shared data collection, participate in bi-annual roundtables, and engage in mutually reinforcing activities that drive progress toward our shared goal.

The term of this grant is two years from July 1, 2026, through June 30, 2028 with the potential for a third-year renewal based on progress and impact. Our goal - 15,000 people will be ready to start stable careers having overcome key employment barriers by 2029.

To support this effort, we ask that funded organizations:

- Make every effort to collect key demographic information from all participants involved in RBEA-related activities
- Participate in a site visit during the grant period
- Submit both a mid-year and year-end report
- Attend a spring and fall grantee roundtable each year

We're excited to partner with you and look forward to the impact we can make together for our communities. We're here to support you in meeting all grant requirements. If anything is missed, funding may be paused until things are back on track, and it may influence consideration for future funding.

DATA COLLECTION REQUIREMENTS

All funded organizations are required to report unduplicated demographic information for all participants served using the categories listed below.

Required demographics:

- **Age Groups:** 0-3, 4-5, 6-11, 12-17, 18-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95 and older
- **Gender:** Male, Female, Transgender, Non-binary/Genderfluid/Prefer to self-describe, Prefer not to say (Please note that Non-binary/Genderfluid/Prefer to self-describe is one category)
- **Household Income:** \$0 to \$9,999, \$10,000 to \$14,999, \$15,000 to \$24,999, \$25,000 to \$34,999, \$35,000 to \$44,999, \$45,000 to \$54,999, \$55,000 to \$64,999, \$65,000 to \$74,999, \$75,000 to \$84,999, \$85,000 to \$89,999, \$90,000 or more, Free and reduced lunch (if income data is not available)
- **Racial Background:** African American/Black (not Hispanic or Latino), Asian (not Hispanic or Latino), Caucasian/White (not Hispanic or Latino), Hispanic/Latino, Hmong/Laothian (not Hispanic or Latino), Middle Eastern (not Hispanic or Latino), Native

American (not Hispanic or Latino), Native Hawaiian/Pacific Islander (not Hispanic or Latino), Multi-racial, Other

- **ZIP Code:** All zip codes in Milwaukee, Washington, Ozaukee, or Waukesha, Outside of four-county area, or currently experiencing homelessness.

Required Outcomes

Organizations awarded a RBEA grant will be asked to report back on how many people met the criteria towards our goal that 15,000 people will be ready for stable careers using the criteria listed below.

Education, Training, and Credentials

- Number of participants receiving a job credentialing certification, GED/HSED, skill certification, or equivalent. (i.e. CNA, CDA, Apprenticeship, Manufacturing (CNC), IT Services, etc.)
- Number of participants who completed multi-year education credentials during the years the organization is funded by United Way. For example, associate or bachelor's degrees.

Transportation Programs

- Number of participants that had their driver's license reinstated within the program year.
- Number of participants who received frequent transportation to work. (5 or more rides per week)

**Bus passes are not included as transportation.*

Involvement In the Justice System Focused Programs

- Evidence of employment resources, wrap around care, and skill development
- Number of participants that had their legal issue resolved (e.g., record expungement, fines cleared) within the program year.

Employment Programs

- Number of participants that obtained employment (job placement) and demonstrate growth in multiple skills critical to job readiness (e.g., communication, time management, problem-solving)
- Average wage of any jobs secured by participants during the program year.

Organizations with **youth-serving programs** must demonstrate that they serve [opportunity youth](#) in any of the areas listed above. These are defined as youth who are between the ages of 16 and 24 and are neither enrolled in school nor working.

REPORTING GUIDELINES

Submission of a mid-year and year-end report using the e-CImpact online reporting system will be required from all funded organizations.

Approximately one month prior to mid-year and year-end report due dates, funded organizations will receive an email from United Way staff with directions on how to access reports in e-CImpact.

RBEA INITIATIVE TIMELINE

Future timelines will be released June 1st of the new grant year.

- **June 1, 2026:** Applicants are notified of award status and are given Collaboration Agreement for review and signatures.
- **July 1, 2026:** Funded organizations are notified of award amount, funding year begins
- **July 1, 2026:** Signed Collaboration Agreement uploaded into e-CImpact
- **July 15, 2026:** First monthly grant award payment made via ACH.
 - Grant award payments are made monthly around the 15th of the month for the duration of the fiscal year. Organizations may request a different payment schedule for special circumstances.
- **August – December 2026:** Site visits
- **November 5th 2026:** Fall Roundtable
- **January 25, 2027:** Mid-year report due in e-CImpact by 4:30 pm
- **May 5th, 2027:** Spring Roundtable
- **June 1, 2027:** Funded organizations notified of next fiscal year timeline, any changes to the collaboration agreement, and asked for renewal signatures.
- **June 30, 2027:** Year 1 funding ends
- **July 1, 2027:** Year 2 award letter issued, signed collaboration agreement uploaded into e-CImpact
- **July 26, 2027:** Year-end report due in e-CImpact by 4:30 pm

Reducing Barriers To Employment and Advancement Grant Contact:

Gevonchai Hudnall-Vogel, Impact Manager, Reducing Barriers To Employment and Advancement

ghudnall@unitedwaygmwc.org 414.263.8337

ADDENDUM A - TEEN MENTAL WELLNESS: EMPOWERING MINDS

The Teen Mental Wellness: Empowering Minds (TMW:EM) initiative is a collective impact model focused on developing comprehensive school mental health systems at local high schools throughout United Way's four county footprint. These school-based systems are reliant on community-based organizations meeting the needs of these students by providing services within schools and the clinic setting as needed. We view each funded organization as a partner in this work.

As part of Teen Mental Wellness: Empowering Minds, funded organizations are encouraged to take an active role in shared data collection, participate in bi-annual roundtables, and engage in mutually reinforcing activities that drive progress toward our shared goal.

The term of this grant is three years from July 1, 2026, through June 30, 2029. Our goal – Empowering Minds schools will elevate the mental wellness of 21,000 high school students by 2030.

To support this effort, we ask that funded organizations:

- Make every effort to collect key demographic information from all participants involved in TMW:EM -related activities.
- Participate in a mid-year site visit each year.
- Submit a year-end report.
- Attend a spring/summer roundtable each year.

We're excited to partner with you and look forward to the impact we can make together for our communities. We're here to support you in meeting all grant requirements. If anything is missed, funding may be paused until things are back on track, and it may influence consideration for future funding.

DATA COLLECTION REQUIREMENTS

All funded organizations are required to report unduplicated demographic information for all participants served using the categories listed below.

Required demographics:

- **Age Groups:** 0-3, 4-5, 6-11, 12-17, 18-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95 and older
- **Gender:** Male, Female, Transgender, Non-binary/Genderfluid/Prefer to self-describe, Prefer not to say (Please note that Non-binary/Genderfluid/Prefer to self-describe is one category)
- **Household Income:** \$0 to \$9,999, \$10,000 to \$14,999, \$15,000 to \$24,999, \$25,000 to \$34,999, \$35,000 to \$44,999, \$45,000 to \$54,999, \$55,000 to \$64,999, \$65,000 to \$74,999, \$75,000 to \$84,999, \$85,000 to \$89,999, \$90,000 or more, Free and reduced lunch (if income data is not available)

- **Racial Background:** African American/Black (not Hispanic or Latino), Asian (not Hispanic or Latino), Caucasian/White (not Hispanic or Latino), Hispanic/Latino, Hmong/Laotian (not Hispanic or Latino), Middle Eastern (not Hispanic or Latino), Native American (not Hispanic or Latino), Native Hawaiian/Pacific Islander (not Hispanic or Latino), Multi-racial, Other
- **ZIP Code:** All zip codes in Milwaukee, Washington, Ozaukee, or Waukesha, Outside of four-county area, or currently experiencing homelessness.

Required Outcomes

In the Year-End Report, funded organizations will be asked to report on the following including but not limited to:

- The number of participants served in the aligned program.
- The type of program and how it aligns with the Teen Mental Wellness: Empowering Minds initiative.
- Describe any mental wellness work conducted at any of the current [Empowering Minds high schools](#).
- Describe any changes in the organization's waiting list (if applicable) to receive the aligned services as a result of Impact Based Funding.
- Results from the outcomes tools identified in the LOI.

REPORTING GUIDELINES

Submission of a year-end report using the e-CImpact online reporting system will be required from all funded organizations.

Organizations will receive an email in December providing additional details about the mid-year site visit as well as scheduling instructions.

Approximately one month prior to year-end report due dates, funded organizations will receive an email from United Way staff with directions on how to access reports in e-CImpact.

TEEN MENTAL WELLNESS: EMPOWERING MINDS TIMELINE

Future timelines will be released June 1st of the new grant year.

- **June 1, 2026:** Applicants are notified of award status and are given Collaboration Agreement for review and signatures.
- **July 1, 2026:** Funded organizations are notified of award amount, funding year begins
- **July 1, 2026:** Signed Collaboration Agreement uploaded into e-CImpact
- **July 15, 2026:** First monthly grant award payment made via ACH.
 - Grant award payments are made monthly around the 15th of the month for the duration of the fiscal year. Organizations may request a different payment schedule for special circumstances.
- **January/February 2027:** Mid-Year site visits
- **Spring/Summer 2027:** Roundtable for funded organizations
- **June 1, 2027:** Funded organizations notified of next fiscal year timeline, any changes to the collaboration agreement, and asked for renewal signatures.
- **June 30, 2027:** Year 1 funding ends

- **July 1, 2027:** Year 2 award letter issued, signed collaboration agreement uploaded into e-CImpact
- **July 26, 2027:** Year-end report due in e-CImpact by 4:30pm

Teen Mental Wellness: Empowering Minds Grant Contact

Amanda Weiler, Impact Manager, Teen Mental Wellness: Empowering Minds
aweiler@unitedwaygmwc.org; 414-263-8116

ADDENDUM A - COMMUNITY RESILIENCY & LEGACY

United Way believes every community deserves to prosper. We work with our neighbors to build resilient communities that are more connected, supportive and ready to respond to any challenge. Organizations funded through Community Resiliency provide referral and support to access community resources, local disaster response, capacity building support for nonprofits, and sustaining a past collective impact effort. We view each funded organization as a partner in this work.

The term of this grant is three years from July 1, 2026, through June 30, 2029..

To support this effort, we ask that funded organizations:

- Make every effort to collect key demographic information from all participants involved in activities related to the strategy area.
- Participate in a site visit during the grant period
- Submit a year-end report

We're excited to partner with you and look forward to the impact we can make together for our communities. We're here to support you in meeting all grant requirements. If anything is missed, funding may be paused until things are back on track, and it may influence consideration for future funding.

DATA COLLECTION REQUIREMENTS

All funded organizations are required to report unduplicated demographic information for all participants served using the categories listed below.

Required demographics:

- **Age Groups:** 0-3, 4-5, 6-11, 12-17, 18-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95 and older
- **Gender:** Male, Female, Transgender, Non-binary/Genderfluid/Prefer to self-describe, Prefer not to say (Please note that Non-binary/Genderfluid/Prefer to self-describe is one category)
- **Household Income:** \$0 to \$9,999, \$10,000 to \$14,999, \$15,000 to \$24,999, \$25,000 to \$34,999, \$35,000 to \$44,999, \$45,000 to \$54,999, \$55,000 to \$64,999, \$65,000 to \$74,999, \$75,000 to \$84,999, \$85,000 to \$89,999, \$90,000 or more, Free and reduced lunch (if income data is not available)
- **Racial Background:** African American/Black (not Hispanic or Latino), Asian (not Hispanic or Latino), Caucasian/White (not Hispanic or Latino), Hispanic/Latino, Hmong/Laotian (not Hispanic or Latino), Middle Eastern (not Hispanic or Latino), Native American (not Hispanic or Latino), Native Hawaiian/Pacific Islander (not Hispanic or Latino), Multi-racial, Other
- **ZIP Code:** All zip codes in Milwaukee, Washington, Ozaukee, or Waukesha, Outside of four-county area, or currently experiencing homelessness.

Additional data collection

In the Year-End Report, funded organizations will be asked to report on the following including but not limited to:

- The number of participants served in the aligned program.
- A description of the program and how it aligns with the chosen strategy.
- Changes in the organization's ability to provide services as a result of Impact Based Funding.
- Results from the outcomes tools identified in the LOI. (where applicable)

REPORTING GUIDELINES

Submission of a year-end report using the e-CImpact online reporting system will be required from all funded organizations.

Approximately one month prior to year-end report due dates, funded organizations will receive an email from United Way staff with directions on how to access reports in e-CImpact.

COMMUNITY RESILIENCY & LEGACY TIMELINE

Future timelines will be released June 1st of the new grant year.

- **June 1, 2026:** Applicants are notified of award status and are given Collaboration Agreement for review and signatures.
- **July 1, 2026:** Funded organizations are notified of award amount, funding year begins
- **July 1, 2026:** Signed Collaboration Agreement uploaded into e-CImpact
- **July 15, 2026:** First monthly grant award payment made via ACH.
 - Grant award payments are made monthly around the 15th of the month for the duration of the fiscal year. Organizations may request a different payment schedule for special circumstances.
- **June 1, 2027:** Funded organizations notified of next fiscal year timeline, any changes to the collaboration agreement, and asked for renewal signatures.
- **June 30, 2027:** Year 1 funding ends
- **July 1, 2027:** Year 2 award letter issued, signed collaboration agreement uploaded into e-CImpact
- **July 26, 2027:** Year-end report due in e-CImpact by 4:30pm

Contact Information

Briana Fox, Impact Specialist

bfox@unitedwaygmwc.org

ADDENDUM B ELIGIBILITY & ORGANIZATION STANDARDS

To receive funding from United Way of Greater Milwaukee & Waukesha County, an organization must meet United Way's eligibility requirements and, on an annual basis confirm they are meeting our organization standards.

ELIGIBILITY REQUIREMENTS

Organizations must meet the following eligibility requirements to be funded by United Way. If there are any changes to your organization's eligibility to be funded by United Way, please contact your Impact Manager or Gerry Coon, Director, Key Initiatives, gcoon@unitedwaygmwc.org to discuss.

Organizations funded by United Way must:

1. Be a nonprofit provider to people residing in Milwaukee, Waukesha, Ozaukee, or Washington Counties. If the organization serves Washington County, they must provide services to Germantown residents.
2. Be tax-exempt as described in section 501(c) (3) of the Internal Revenue Code, in good financial standing, and have been operating locally for a minimum of a year.
 - a. Applicants who do not meet the above requirements may use a fiscal agent that does meet the requirements.
3. Be governed by an autonomous Board of Directors.
4. Demonstrate that it meets all applicable requirements of local, state, and/or federal government concerning credentialing, accreditation, and/or licensing. This also includes written non-discrimination, conflict of interest, and whistleblower policies in the (1) provision of its services, (2) selection of Board, volunteers, committee members, and (3) the employment of staff.
5. Consent to the full disclosure of its financial condition when necessary or requested.

The following are deemed outside the purview of United Way funding:

1. Political causes, candidates, organizations, or campaigns,
2. Organizations that refuse services based on religion or require attendance or participation in religious services/activities as a condition of assistance,
3. Athletic teams or events,
4. Booster or social clubs, and
5. Individual needs, such as scholarships or other forms of individual financial aid.

ORGANIZATION STANDARDS

United Way asks that funded organizations certify annually that they are in compliance with the following standards. Annual certification of these standards will occur at the time of signing this agreement unless otherwise noted.

- Regularly convene a voluntary, local board of directors or an advisory board/committee.
- Have on file at United Way accurate and up to date banking information for ACH transactions. ACH change forms are available on United Way's website to be uploaded to a secure ShareFile site. <https://unitedwaygmwc.org/For-Nonprofits>
- Have on file in e-CImpact, a copy of the most recent completed version of the following:
- **Due at the time of the application**, organizations submit:
 - 501(c)(3) authorization letter

- “Doing Business As” documentation (if applicable)
- IRS 990 or 990EZ (if 990EZ is submitted then Pro Forma pages must be submitted as well)
 - Organizations exempt from filing an annual 990 must upload a statement certifying the exemption and reason for the exemption.
- **Due at the time of this signed agreement,** funded organizations will be asked to submit:
 - Organization’s board-approved nondiscrimination policy.
 - Policy on Protecting Children (if organization serves children or youth in any capacity)
 - Current Board membership roster showing the members’ affiliations and terms of service with Board officers indicated.
 - Please note: This item is due annually throughout the term of this agreement.

FINANCIAL REPORTING

United Way takes the stewardship of donor dollars very seriously. We are part of a larger trusted network. To ensure continued donor trust, we may ask funded organizations for additional financial information as described below.

By signing this agreement, funded organizations agree to:

- Provide a complete copy of its most recently filed IRS Form 990, upon request.
- Make its Form 990 publicly available in accordance with IRS regulations and state law.
- Provide additional financial or tax documents as reasonably necessary to confirm compliance with this agreement, upon request.
 - Additional financial information may include, but is not limited to: audited financial statements, management letters received as a part of annual audits, internal financial statements, and internal budgets.

United Way can withhold impact-based funding distributions for failure to provide financial documentation requested, with future payments being held or forfeited on a rolling basis until the issue is resolved.

ADDENDUM C FUNDING PROCESS

Grant awards are made on United Way's fiscal year, July 1-June 30. Additional funding may or may not be available in subsequent years. United Way of Greater Milwaukee & Waukesha County relies on the generosity of the community, and we take the stewardship of these dollars and funding obligations seriously.

Grant investment decisions are made based on the following factors:

1. Availability of dollars
2. Alignment with United Way's investment priorities
3. Current and emerging needs in the community
4. Health and viability of the organization in which United Way invests (financial and governance health)
5. Compliance with the terms outlined in this Agreement

Funding may be reduced or not extended for several reasons including, but not limited to:

1. Lack of United Way funds.
2. Poor performance/lack of significant outcomes
3. Organization fiscal or management issues.
4. United Way may hold funding due to non-compliance with the terms outlined in this Agreement— if dollars are held for three consecutive months, the organization will forfeit monthly allocations on a rolling basis until issues are resolved.

United Way will make every effort to ensure that multi-year funding commitments are honored at the level with which they are awarded. If funding must be reduced or not extended, United Way will notify the organization as soon as possible with rationale for the decision and timing of the reduction.

ADDENDUM D DONOR DESIGNATION DISTRIBUTION PROCESS

All 501(c)(3) organizations in good standing with the IRS are eligible to receive designations directed by donors through United Way. Donors may select or write-in nonprofit organizations that they want their donation to go to. United Way does not provide oversight over these dollars aside from tracking and distribution, and the amount of donor designations to your nonprofit has no bearing on our grant amount decisions. This is a process often referred to as “Separate Streams.”

UNDERSTANDING DONOR DESIGNATIONS

Donor Designations: Donors may elect to have some of all of their United Way giving allocated directly to eligible nonprofits. These are passed through United Way and paid directly to eligible 501(c)(3) organizations.

Paid on Pledge: Donors may give to United Way through their workplace campaign or be asked to be billed later (deferred gifts). It can take United Way 18-24 months to collect all of the pledged donations. Rather than have the recipient nonprofit wait for the funds to be collected, United Way will pay based on the total pledge to the organization. United Way holds back a percentage of paid on pledge donations to offset the amount we are unable to collect.

Uncollectable Pledges: Pledges become uncollectable when a person leaves a workplace or is otherwise unable to pay their pledge. United Way reviews the hold-back percentage annually and may adjust it based on actual uncollectable pledges.

Paid on Received: Donations through workplace campaigns or otherwise that are received by cash, check, or credit card are paid to United Way in full at the time of the donation or shortly after the pledge. Paid on Received campaign gifts are distributed to your organization based on actual payments received, rather than on original pledge amount. Since the donor paid this in full United Way does not hold back anything for uncollectable funds.

Community Campaign: Donors may give to the 501(c)(3) organization of their choice through United Way’s community-wide campaign. While the public campaign runs from August – December each year, United Way collects these donations year round.

Public Sector campaigns: Public sector campaigns run separately from the United Way Community campaign and allow opportunities for donors to designate their donations to nonprofit organizations. United Way may process designations to your organization through public sector campaigns.

Third party campaigns: United Way may process designations from campaigns that are non-United Way or public sector. Third party campaigns may also distribute designations to your organization outside of United Way’s designation distribution schedule.

Donor designation distribution schedules

The majority of designations to nonprofit organizations are made via ACH and distributed on different schedules depending on the source of the designations. Please ensure that your organization's [ACH information is current and up to date](#).

Paid on Pledge: Designations made during the fall Community Campaign are paid quarterly in April, July, October & December of the following calendar year.

Public Sector: Designations made during the fall Public Sector campaigns are paid out in February, May, August, November, and the following February.

Paid on Received: Paid on Received payments are made to agencies monthly, based on payments we receive from the donor the month prior. Payments are made mid-month each month.

- Example: If a donor makes a \$100 pledge in September and we receive a \$100 payment from the donor by the end of October, that payment would be distributed to the organization in mid-November.
- Similarly, if a donor sets up a recurring monthly credit card pledge of \$100/month, starting in September, and we receive \$100 via credit card in September, that payment would be distributed to the organization in mid-October.

Tocqueville Gifts: Individuals who contribute \$10,000 or more annually to United Way of Greater Milwaukee & Waukesha County's Community Campaign, with at least \$6,000 directed to United Way and/or Key Initiatives are recognized as Tocqueville Society members. Tocqueville gifts are paid out based on pledge (not cash received) and are paid by check to organizations within 30 days of the pledge. United Way does not apply any fees or holdbacks to Tocqueville gifts.

*Distribution of donor designations is subject to change. Any changes in the distribution schedule will be communicated to all funded organizations in advance of the change.

Agency Portal and Donor Reports

The Agency Reports Portal includes detailed information about the differences between Paid on Pledge and Paid on Received campaigns. Your organization may receive payments from both the UW Local-Paid on Received Campaign and the UW Local-Paid on Pledge campaign. Donor information is available on the Agency Reports Portal by running the Donor Detail Report.

We ask that all organizations set up access to our Agency Reports Portal. Organizations can register by clicking this link [Agency Contact Registration](#) or navigating to the site using this URL. <https://secure.unitedwaygmwc.org/community/Volunteer/AgencyRegistration.jsp>

Organizations with access can visit the Agency Reports portal by clicking this link [Agency Reports Portal](#) or navigating to the site using this URL. <https://secure.unitedwaygmwc.org/community/crm/Start.jsp>

Organization contacts enrolled through our Agency Reports Portal will receive an email the first time a donor designates to your organization during the fall campaign and when designation

payments are disbursed. Please make sure to login in frequently to get any new designation information on the Donor Detail Report.

Thanking Donors

Donors giving to your organization through United Way are your donors as much as they are United Way's. Donor detail information is available to you in the Agency Reports Portal unless the donor requested to stay anonymous. United Way highly encourages you to honor the donor's wishes by sending a thank you for their pledged donation as soon as possible.

Tax Receipts

United Way is responsible for tax receipting donors.

Administrative Fees

Designation payments to organizations funded by United Way through Impact-Based Funding are not subject to administrative fees for the Community Campaign.

Organizations not funded by United Way through Impact-Based Funding pay a 10% administrative fee (capped at \$250 per donor) for designations.

For funded and not funded organizations, there remains a 5% and 3% holdback for uncollected pledges if the donor donates via payroll deduction or deferred billing, respectively.

*Please note that United Way administers other giving campaigns, including Public Sector giving campaigns and Non-Local Out of Area Campaign. Each of these campaigns has different fee and holdback structures; if your organization receives designations as part of those campaigns, your organization would be subject to those fee structures. Please see our [Agency Portal FAQs](#) for more information. Additionally, administrative fees and holdback are subject to change.

Agency Help Desk

If you have any questions, please do not hesitate to contact our Agency Help Desk: 414-269-1999 or agency@unitedwaygmwc.org

ADDENDUM E SUPPLEMENTAL FUNDRAISING POLICY/BLACKOUT PERIOD

United Way knows that funded organizations rely heavily on their own internal fundraising teams, strategies, and support and we encourage such efforts. United Way does ask, however, that these activities are limited between **September 1 and October 31**.

United Way's expectation that funded organizations do not participate in locally-based fundraising during the community campaign is in no way an attempt to be punitive – it simply recognizes that United Way's chances for successful fundraising are best when we aren't competing with the organizations we fund. This policy is strongly supported by our corporate partners who run robust workplace campaigns and prefer their employees not to receive other solicitations at that time.

Policy

Except as expressly provided below, United Way of Greater Milwaukee & Waukesha County's funded organizations are prohibited from supplemental fundraising activities from September 1 through October 31. **In addition, funded agencies are prohibited from encouraging donors to designate to their organization through United Way giving.**

Prohibited Conduct

Funded organizations shall not conduct any major fundraising activities from September 1 through October 31. Fundraising activities refer to efforts to obtain financial support for the organization from local, non-governmental sources, including corporations and individuals. Such fundraising activities include, but are not limited to, the following: telephone, mail, online/social media solicitations initiated by the organization, direct solicitation for donor designations to your organization, electronic contribution solicitations and follow up; and major media events.

While we allow organizations to have special events during the Blackout Period, it is our expectation that all major fundraising for the event will take place outside of the Blackout Period, and that United Way's contribution is recognized at the event alongside other funders/donors at the same investment level.

Exemption Requests

Funded organizations shall submit in writing an exemption request at least 60 days before undertaking any fundraising activity which violates this policy.

For an organization's planning purposes, the written request may have to be submitted significantly more than 60 days before the activity. The exemption request should be sent to Gina Santagati, Chief Development Officer, at gsantagati@unitedwaygmwc.org and should include the following:

- A description of the proposed fundraising activity.
- Rationale for taking place within blackout period.
- The beginning and end date(s) of the activity.
- The methods to be used to promote the activity.
- Identification of those to be solicited and/or involved.
- Expected financial and other benefits derived from the activity.

United Way staff will review and either approve or deny the request. Staff will strive to respond to the organization within 5 business days of receipt of the written request. In making the decision to approve or deny the request, United Way staff will consider several factors, including the rationale for the timing of the event, the size of the event, fairness to other funded organizations, and the potential for interference with the United Way Community Campaign.

Capital Campaigns

Agencies planning to conduct a capital campaign shall inform United Way in writing of the plan as far in advance as possible. **No solicitation of corporate partners shall occur from September 1 through October 31.** In connection with any planned campaign, agencies shall submit the following information to United Way:

- Description of the project
- Financial goals of the capital campaign
- Timing of the campaign

Sanctions

By signing this Agreement, all funded organizations agree that fundraising activities and efforts will be conducted in accordance with the above guidelines. United Way will review any violations discovered by or reported to United Way. United Way reserves the right to decrease or withhold funding from organizations determined to be in violation of this policy.

ADDENDUM F SUPPORTING UNITED WAY'S COMMUNITY CAMPAIGN

Organizations funded by United Way are an important partner in our efforts to fundraise to support nonprofit organizations like yours. We ask that you acknowledge and promote United Way's partnership to staff, volunteers, and the public. ([See Addendum I](#)) We also ask that you neither encourage nor discourage designations directly to your organization and participate in our Community Campaign by hosting a campaign, having qualified staff serve on our Speakers Bureau, and participate in our nonprofit Campaign Cabinet (upon request.) More information on those opportunities can be found in this addendum.

Additionally, there may be times when we ask organizations to offer tours or visits so that our staff and donors can connect with the causes they care about and are investing in.

HOSTING A UNITED WAY CAMPAIGN

We ask all funded organizations to host a United Way campaign. A campaign is defined as hosting at least one event between September-December to educate your employees and board members about the work of United Way and that all full-time staff be given the opportunity to donate.

Agencies are asked to assign an ambassador to coordinate the campaign, and United Way supplies the other tools your organization needs to run a successful campaign including:

- Ambassador training
- A trained United Way Campaign Coordinator (formerly known as Loaned Executive) to assist the ambassador in planning your campaign and to speak to your employees about United Way.
- Campaign materials (paper or electronic forms are available)

Please contact Will Babka, Account Manager, Resource Development, wbabka@unitedwaygmwc.org with any questions.

SPEAKERS BUREAU

Speakers Bureau is a powerful way that United Way can educate the community about United Way-funded organizations and how working together advances the common good. By sharing personal success stories, speakers inspire businesses, volunteers, and the community to give and to be part of positive change in Greater Milwaukee & Waukesha County. This program offers funded organization staff excellent opportunities to interface with a wide variety of community leaders and business professionals as well as share their passion for what they do. It also allows the funded organization the opportunity to build and enhance corporate relationships, foster community awareness for the organization's mission, and encourage future volunteers. In short, the speaker's role is to tell the powerful stories that drive individuals to give back, get involved, and take action. Speakers are integral to assisting United Way in raising the dollars to help support organizations in our community.

Funded organizations are encouraged, but not required, to provide at least one Speakers Bureau representative each year. Those selected to participate must be top quality presenters who are passionate and enjoy public speaking. Funded organization agencies will receive the speaker's job description and requirements in June.

All speakers must attend training; Speaker training consists of two training sessions. Session one includes United Way basics, key messages, story creation ideas and presentation tips. Session two is an opportunity for speakers to practice their speeches with other speakers and United Way staff.

All participants receive a basic speech template that outlines the process and key messages because it is critical for all volunteers to deliver a unified message.

Most speakers will present two to five times during the August - December campaign season. 2025 campaign speeches will be held both virtually and in person- dependent on the preferences of the workplaces. All virtual speakers must have access to a computer with internet capability and a webcam.

Speakers Bureau Timeline

- June-July– Speakers recruited
- July-August – Speakers trained
- August-December – Speaking engagements scheduled

Contact Emily Nehmer, Corporate Engagement, enehmer@unitedwaygmwc.org with questions.

SERVING ON UNITED WAY'S CAMPAIGN CABINET

Funded organizations are encouraged to identify a qualified staff member to serve on United Way's Nonprofit Campaign Cabinet.

The Nonprofit Cabinet is made up of leaders from United Way funded and non-funded agencies who demonstrate a significant commitment to the campaign. We ask that nonprofit cabinet members utilize their network to solicit, secure, and strengthen workplace giving.

Nonprofit Cabinet members are asked to be an active and visible advocate for United Way, internally and externally.

Responsibilities include:

- Develop strategies and objectives with staff and volunteers for increasing dollars raised in the Nonprofit Division and for expanding the number of organizations that hold workplace campaigns.
- Identify and recruit a team of volunteer fundraisers (2 or 3) to assist with solicitations in the Nonprofit and other divisions. Review prospect lists and identify organizations you have a relationship with and would be willing to invite to support United Way. Connect with 6-8 organizations to support United Way. Complete all calls by August 31.
- Help secure incentive items to promote increased giving in the Nonprofit Division (e.g. gift cards, sport, theater, or local attraction tickets).
- Encourage agency executives and other decision-makers to support the campaign actively and visibly in their workplace and to make a personal gift to United Way.

- Attend a Division Cabinet meeting (April/May), Fundraising Best Practices session (July), four campaign cabinet meetings, and campaign kickoff and closing events.

Contact Annie Hernandez, Director of Resource Development,
ahernandez@unitedwaygwmc.org with questions.

ADDENDUM G MANDATED REPORTER TRAINING & POLICY ON PROTECTING CHILDREN

United Way of Greater Milwaukee & Waukesha County is committed to the safety of youth in this community. United Way **requires** that all staff at United Way funded organizations who serve children and youth in any capacity complete mandated reporter training and all funded organizations have a separate policy on protecting children. Any member of staff that has completed mandated reporter training should take refresher training online and review the policy on protecting children at least once a year.

We understand that there are very few exceptions to mandatory reporting by youth-serving staff in Wisconsin. These positions are called “permissive” reporters. If the only staff at your organization who have contact with children are permissive reporters, you may request an exemption by contacting your Impact Manager and provide rationale for an exemption.

MANDATED REPORTER TRAINING GUIDELINES

To comply, mandated reporter training must include the following components.

Definitions and Identification: Define and describe child abuse and neglect (physical, sexual, and emotional) and teach how to identify signs of each.

State-specific laws: Detail specific state laws and regulations that define who is a mandated reporter and their reporting duties. It must also detail legal requirements regarding caregiver abuse vs. non-caregiver abuse.

Reporting procedures: Training should explain the process for making a report and who to report to. Organization should also ensure that all staff are familiar with any organizational policies about making a report and documentation of reports.

Legal & Ethical Responsibilities: Participants should understand their legal obligation to report and ethical responsibility to keep children from harm. Additionally, training should include legal protections for mandated reporters.

Safety Planning: Instruction on developing safety plans for youth, and ways to ensure the safety of the youth after the report has been made.

Other Considerations: The training should include case examples, provide information on how to support children who witness abuse, list and describe rules for personal contact of the youth worker with a child, and provide a resource list to attendees.

Wisconsin Online Mandated Reporter Training: This training can be used instead of in-person training if no other training is available.

<https://media.wcwpds.wisc.edu/mandatedreporter/>

POLICY ON PROTECTING CHILDREN

It is an organization's responsibility to provide staff with policies and procedures ensuring the safety of children that are in contact with your organization or programs. These policies not only protect children, but also the staff and volunteers who work with children at the organization. We ask that all organizations review policies on protecting children annually and update as needed. These policies should be reviewed with staff or volunteers upon hire and annually thereafter.

Policies and procedures on protecting children should include, at a minimum, the following components. These can be in one single policy, or in multiple organizational policies, as long as they are all present.

Definitions & Purpose: Provide definitions of child abuse and neglect (physical, sexual, and emotional) and a purpose statement describing the importance of the policy(ies).

Hiring and Onboarding Guidelines: Procedures on screening staff and volunteers, that may include criminal background checks, sex offender database search, reference check, etc. Include when policies on protecting children are reviewed and signature commitment pages in onboarding.

Ensuring Safe Environments: Guidelines on appropriate interactions between adults and children including, but not limited to, providing safe environments and a "two-adult" rule. Additionally, it should include parameters regarding what is and is not appropriate or allowable physical contact with children and provide guidance for staff and volunteers who interact with children.

Mandatory Reporting: A policy must explain the mandatory child abuse reporting laws applicable to the organization or institution.

Training: Include onboarding and annual training requirements for employees and volunteers. Training topics can include child abuse topics like grooming, power differentials, mandatory reporting, etc.

Social Media: Describe appropriate use of social media and digital communications with minors that includes appropriate social media sites, private communications, documentation, and the preservation of communications.

Investigations: Policy documenting the process for conducting internal investigations, notifying and/or cooperating with law enforcement, determining interim employment measures, and guidelines for engaging an independent third-party investigation team.

Communication: Identify roles, responsibilities, and requirements for information sharing when a crisis occurs. This includes communicating with parents, other organizational staff, and organizational partners (as needed or required).

United Way Support

Please see the e-CImpact resource center for samples and a power point on developing a strong Policy on Protecting Children. Contact your Impact Manager or Amanda Weiler, aweiler@unitedwaygmwc.org with questions.

ADDENDUM H VOLUNTEER ENGAGEMENT

United Way of Greater Milwaukee & Waukesha County's Volunteer Engagement Division collaborates with funded organizations to mobilize volunteers in support of agency missions.

Contact Information & Communication:

- Funded organizations will be asked to provide the name and contact information of the lead staff members responsible for identifying and coordinating volunteer efforts.
- United Way Volunteer Engagement staff will communicate year-round on strategic volunteer mobilization efforts and United Way donor requests for volunteer projects.

Volunteer Opportunities:

United Way partners with several local workplaces and community organizations to engage employee groups and individuals in giving back to the community through the gift of time and expertise to drive change and build nonprofit capacity. A special emphasis is given to volunteer efforts that support the achievement of United Way's Key Initiative community goals.

Mobilizing Products:

United Way also mobilizes new products and supplies for funded agencies through its Uniting Products for Good efforts and signature volunteer events. Examples include backpacks and school supplies for the start of the new school year; diapers and baby wipes; holiday gifts; health and hygiene products; house and home kits; and nonperishable food boxes. Each organization is required to formally sign up to receive donations to support logistics and marketing of product donation impact.

Volunteer Portal:

United Way of Greater Milwaukee & Waukesha County is transitioning to a new community volunteer portal in 2026 (currently known as "Volunteers United") that will give funded organizations a free, targeted web-based volunteer engagement tool to post ongoing and emerging volunteer recruitment needs. A communication will be sent to funded organizations when this community engagement tool is scheduled to launch, and a separate agency user agreement will be required to utilize this United Way branded resource.

Agency Terms & Conditions: Learn more about Volunteer Engagement Agency Terms & Conditions here: <https://unitedwaygmwc.org/Volunteer/Agency-Terms-and-Conditions.htm>

For more information related to partnering with United Way's Volunteer Engagement Division, contact Karissa Gretebeck at kgretebeck@unitedwaygmwc.org.

ADDENDUM I CO-BRANDING & LOGO USAGE GUIDELINES

United Way is one of the most recognized and trusted philanthropic brands in the world. By co-branding with United Way of Greater Milwaukee & Waukesha County, funded organizations are assured that they will be identified as leaders in the community. United Way values its relationship with its funded organizations, recognizing that our individual capacities expand the power to find solutions that change people's lives. For this reason, United Way believes that co-branding with its funded organizations is critical to the success of the collective effort. Co-branding strengthens communication, community outreach, and the success of respective community philanthropic efforts.

We encourage all funded organizations to connect with us on social media. United Way of Greater Milwaukee & Waukesha County can be found on Facebook, Instagram, LinkedIn, and YouTube.

United Way of Greater Milwaukee & Waukesha County must be recognized alongside other funders/donors at the same investment level at events, materials, and websites.

To assist funded organizations in leveraging the United Way brand most effectively, the following requirements have been developed.

United Way of Greater Milwaukee & Waukesha County logo must appear on:

- One or more windows (in decal format) on all facilities of funded organizations
- Homepage of website with a link to the United Way of Greater Milwaukee & Waukesha County website: www.unitedwaygmwc.org
- Annual report (front or back cover)
- Printed (front or back page) and electronic newsletters.
- Promotional materials (e.g., brochures)
- Recognition as a funder at organization events (e.g., listed by investment level)

Optional Co-branding opportunities:

- All locally initiated organization publications (front or back cover)
- All print advertisements (for example: newspaper or magazine)
- Printed letterhead and e-stationery.
- Billboards
- Event invitations
- Business cards
- Email signatures
- Social media sites

Commitment of United Way of Greater Milwaukee & Waukesha County to co-brand

Names of funded organizations will appear as follows:

- Listed on the United Way of Greater Milwaukee & Waukesha County website with a direct link to the funded organization website.
- Featured in videos and written stories as appropriate.
- Promoted on social media as appropriate.
- Featured in case studies as appropriate.

Thank you for co-branding with United Way of Greater Milwaukee & Waukesha County. To maintain the value of the United Way brand and logo, please follow the branding guidelines listed below. The logo must always appear in its entirety, without any modifications.

Download logos at: <http://www.unitedwaygmwc.org/Logos>

COLOR



BLACK



For window decals, please contact Elese Mason, Community Impact Administrative Assistant, emason@unitedwaygmwc.org

Contact Melissa Hanon, Director of Marketing, 414.263.8129 or mhanon@unitedwaygmwc.org with questions.

ADDENDUM J CYBER SECURITY

In our digital world, cyber threats are on the rise and it's important for nonprofits to remain vigilant and prepared for cyber-attacks. Below are required and recommended practices to ensure best practices in cyber security. Signing this agreement indicates that the required practices are in place. If you have questions or need assistance implementing these items, please contact your Impact Manager with questions.

Required:

- **Strong Password Policies**– Enforce strong passwords (example: minimum of 14 alphanumeric characters) for email, file storage, and any other system containing personally identifiable information (PII).
- **Multi-Factor Authentication (MFA)** – Implement MFA across the organization for accessing email, file storage, and other key systems that hold personally identifiable information (PII).
- **Cybersecurity Awareness Training** – Conduct regular cybersecurity training for staff, at least annually.
- **Incident Notification**– Notify United Way in the event of a significant cybersecurity incident or data breach at your organization. Significant incidents include ransomware attacks, phishing attacks resulting in exposure of or loss of records containing PII (donor records, client records), or cybersecurity attacks resulting in a financial loss.
- **User Access Review** – Conduct an annual review of e-CImpact and the Donor Reports Portal to ensure user access is accurate and up to date.

Recommended:

- **User Access Controls** –
 - Restrict system access to only those who require it for their roles.
 - Prohibit shared logins.
 - Maintain a process for promptly adding/removing access when staff join or leave the organization.
- **Endpoint Protection** – Ensure antivirus software is installed and actively running on all workstations (laptops, desktops) used for work.

Contact Laura Meine, Vice President Digital Innovation at lmeine@unitedwaygmwc.org with questions about this policy.

Cyber Security Training Resources

National Institutes of Standards and Technology - Employee Awareness Training Resources

<https://www.nist.gov/itl/applied-cybersecurity/nice/resources/online-learning-content#EmployeeAwarenessTraining>

National Cybersecurity Alliance

<https://www.staysafeonline.org/>

Tech4Good Marketplace

The Tech for Good Marketplace operated by Technology United members connects United Way funded organizations with Guest CIOs to assess your current technology and capabilities, identify potential technology opportunities and projects, and align your projects with available pro bono partners for execution.

Learn More: <https://unitedwaygmwc.org/Technology-United-Organization-Requests>

ADDENDUM K - SIGNATURE PAGES

NON-DISCRIMINATION POLICY

The purpose of United Way of Greater Milwaukee & Waukesha County (United Way)'s Nondiscrimination policy is to ensure that all funded organizations abide by applicable laws and regulations and provide service delivery, employment, and board appointments in an inclusive manner, while not limiting an organization or program from providing services specifically designed to meet the specific needs of priority populations. The policy also provides an opportunity for United Way to monitor compliance and provide corrective action when necessary.

United Way believes that every individual in our community is of value and can contribute to a healthy, strong, safe, and caring community. In addition, United Way believes that all deserve to have access to the resources and services that will help them grow to their greatest potential.

To receive funding from United Way of Greater Milwaukee & Waukesha County, an organization must agree to the following non-discrimination policy:

PENDING GOVERNANCE AND BOARD APPROVAL

United Way funded organizations agree that they will not discriminate against clients, staff, and membership on the governing board on the basis of race, color, religion, national origin, ancestry, sex, gender, gender identity, age, sexual orientation and identification, disability, special health care needs, genetic information, social or economic class, familial or marital status, military status, victim of domestic violence, sexual, abuse, or stalking, lawful sources of income, or arrest/conviction records.

Organizations must not require attendance at religious services as a condition of assistance.

This policy does not prohibit any organization from operating specific programs based on previously listed characteristics designed to meet the special needs of priority populations with those characteristics.

By signing this Agreement, the funded organization indicates that the board and leadership of the organization will abide by the terms contained in the non-discrimination policy.

Initials: _____

NOTIFICATION POLICY

To best support our funded organizations, it is imperative that United Way be made aware of any serious infractions or potentially negative events as soon as possible. United Way is often contacted by the media when such issues arise, and we cannot be helpful if we are uninformed or unprepared.

United Way funded organization agrees to notify United Way within 24 hours when significant changes occur at the organization. Significant changes include, but are not limited to:

- Legal issues such as civil lawsuits against the organization or organization staff.
- Criminal conviction of staff or evidence of criminal activities by/at the organization.
- Risk of removal or withdrawal of accreditations or certifications that the organization holds or is seeking.
- Safety issues affecting organization's participants or staff of the organization.
- Significant cyber security incidents or data breaches as described in [Addendum J](#).
- Changes in senior staff including president/CEO/executive director and any other staff relevant to your partnership with United Way.
- Any issue that has significant potential to reflect negatively on the organization and be published by local, state, or national media.

Notification should be sent via email Julie Divjak jdivjak@unitedwaygmwc.org as soon as possible, but no later than 24 hours following the event or awareness of the issue. United Way staff will inform members of its board of directors and other key partners, as it deems necessary.

By signing this Agreement, funded organization indicates the board and leadership of the organization will abide by the terms contained in the notification policy.

Initials: _____

COLLABORATION AGREEMENT SIGNATURE PAGE

This document serves as the Collaboration Agreement between United Way of Greater Milwaukee & Waukesha County (United Way) and the funded organization. This agreement, as well as funding, is valid for the term noted below and contingent upon the items outlined in [Addendum C Funding Process](#). We value the work of all our funded organizations, and we look forward to working together to create positive lasting changes in our community.

Term of Collaboration Agreement:

Organization Name: _____

Print Name:

Title:

Signature:

Date:

Authority to sign: The person signing this Agreement on behalf of the funded organization represents and warrants to United Way that they are a duly authorized officer of the funded organization and has requisite legal power and authority to execute this Agreement on behalf of and bind the funded organization to the obligations herein.

United Way of Greater Milwaukee & Waukesha County

Print Name:

Title:

Signature:

Date:

Please direct questions about this agreement to Gerald Coon, gcoon@unitedwaygmwc.org