2024-25 Community Investment
Policies and Procedures
for Annual Funding

United Way
of Racine County

This Policies and Procedures document serves as a continuation of the information included in the following documents:

- 2024-25 Health, Education and Financial Stability Request for Proposals/2024-26 Essential Services Request for Proposals
- 2024-25 Program Funding Award Letter
- 2024-25 Program Funding Agreement
- 2024-25 Program Funding Agreement Addendum (if applicable)

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Annual Community Investment Overview

United Way of Racine County (UWRC) is committed to improving the health, education, financial stability, and basic needs of every person in our community. Our commitment to the building blocks of a good life is an investment in long-lasting change, not one-size-fits-all solutions. We know tackling our community's toughest challenges takes innovation and expertise. It also takes all of us working together to make sure everyone in our community thrives. UWRC's annual investment process provides funding to nonprofit community-based organizations for programs that serve Racine County residents and align with this commitment to health, education, financial stability and essential services. The community investment process supports programs that address one of the following areas:

Health	Increase mental health well-being through referrals and treatment, and through prevention services.
Education	Improve school performance, social emotional skills and foster leadership and parental involvement.
Financial Stability	Strengthen the financial independence of individuals and families through improved employability and financial security.
Essential Services	Ensure access to food, shelter, medical care, and increase the independence of individuals.

Funding Award Process
Following UWRC's board of director approval of the funding recommendations:
- An agreement for July 1, 2024 – June 30, 2025 is issued between UWRC and the funded organization (and their fiscal agent, if applicable).
  - An agreement may contain an addendum listing conditions or contingencies to be addressed by the organization.
- Ongoing funding during the year is dependent upon compliance with the funding agreement and Community Investment Policies and Procedures and the specifics of the addendum being addressed in a timely manner.

Prior to UWRC disbursing any award allocation:
- A notification of funding decision, proposal evaluation, 2024-25 Program Funding Agreement and Community Investment Policies and Procedures is emailed to each organization's executive director and board president. The funding agreement is null and void if not signed and returned by the organization by the deadline stated in the award letter.
- Organizations awarded funding must have a current completed Form W-9 (Request for Taxpayer Identification Number and Certification) on file with United Way of Racine County. Form W-9 must be submitted upon the

organization's first funding notification and updated if and when any information changes. Funds will not be disbursed until a current Form W-9 is submitted.

- Organizations receiving their first annual investment award must upload a required form on eCImpact for Automated Clearing House transfer.

Award allocations are disbursed on a monthly basis on or before the seventh day of the month via ACH transfer, provided:

- The program services are delivered as proposed at all approved locations.
- The agreement addendum, if any, is addressed.
- LIFT program services (if applicable) are delivered according to the LIFT service calendar.
- All compliance documents, including required reports, are current and submitted to UWRC.
- Alternate fund disbursement methods and/or timelines must be requested in writing and are subject to approval.

Leveraging Your UWRC Funding Award/Partnership

- The amount of the funding award cannot be used by the organization as a rationale in funding appeals for additional program support.
- UWRC-awarded program funding may be used as match dollars.
- At no time during the course of the year may organizations, their volunteers or other representatives solicit or advocate designations to their specific organization through the UWRC campaign.

Organization Conditions and Responsibilities

Organizations that request and receive funding must meet eligibility requirements and maintain compliance with eligibility requirements at all times. This may require organizations to submit updated documents throughout the funding period. It is the organization's responsibility to track compliance expiration and to provide updated information on time within eCImpact.

UWRC reserves the right to assemble a team of volunteers and staff to conduct an in-depth review of any funded program in terms of fiscal, outcome measurement and governance issues, or to request additional financial information that clarifies the relationship between UWRC funded program and the overall organization budget.

The following eligibility documents required at the time of application must be kept current in eCImpact throughout the funding period:
- IRS Determination of Nonprofit Status
- Current board-approved organization budget with reasonable, diverse and sustainable funding sources
- Most recent financial review or financial audit with management letter (from auditor to management regarding internal controls) and management representation letter (from management to auditor confirming responsibility)
  - The financial review/financial audit must be completed within six months of fiscal year-end and updated in eCImpact within seven months of fiscal year-end.
- Fiscal agent agreement, if applicable
- Patriot Act Compliance Statement

In addition, organizations must adhere to the following operating standards.

Nondiscrimination
Funded organizations must maintain stated policies of nondiscrimination and comply with all requirements of state and federal laws and regulations on nondiscrimination and equal opportunity, including the Americans with Disabilities Act (ADA), with respect to board and organizational operations.
- The organization must have an Affirmative Action Plan/Equal Employment Opportunity plan in compliance with state, federal and local guidelines.
- The organization must operate by policy and practice with no unlawful discrimination.
- This must be true in all aspects of the organization's operations, including service to people, selection of board, employment of professional and other staff, and the purchase of supplies.

Liability Insurance
The organization assumes all liability associated with the program. It is the organization's responsibility to maintain documentation that reflects organizational general liability insurance coverage. A certificate of insurance is issued by an insurance company or broker. The document verifies the existence of an insurance policy and summarizes the key aspects and conditions of the policy.

UWRC may request proof of insurance at any time. If the site(s) where the organizations deliver programming, including LIFT locations, require proof of insurance, staff background checks, etc. in order for the program to operate, it is the responsibility of the organization to meet and maintain compliance in accordance with the site requirements. If a program is unable to operate as proposed due to failure to meet site requirements, funding may be held and/or discontinued in accordance with the Community Investment Policies and Procedures.

Board governance
Governance of the organization must be vested in a responsible and active local (southeastern Wisconsin) board of directors. The board must:
- Be comprised entirely of unpaid volunteers (except that the chief executive officer of the organization may be an ex-officio member), meet at least quarterly, and establish and enforce policies.
- Be large enough and structured in a manner to be representative of the community it serves.

The organization must have bylaws that clearly define:
- The organization's purposes and functions.
- The organization of duties, authority and responsibilities of its governing body and officers, or board policies that contain such information.

Financial Conditions and Accountability
The organization must maintain accounting records that follow the current standards of accounting and financial reporting for voluntary health and welfare organizations. The community investment financial team (CIFT) reviews all organization-level financial documents, including the current organization budget, the most current (within the last 18 months) financial statement review or audit, and associated documents. A draft financial statement review or audit will not be accepted. Organizations are responsible for submitting updated documents throughout the funding year.

The financial statement review or audit must be completed following the end of the most recent fiscal year in accordance with [Wisconsin State Statute 202.12 (1)(b)](). For purposes of this section, revenue excludes investment gains and losses.

- Those organizations with less than $500,000 in revenue in the most recently completed fiscal year are required to submit internally or otherwise generated statements of financial position and activities.
- Those organizations with revenue in excess of $500,000 but not more than $1,000,000 in the most recently completed fiscal year are required to submit a reviewed financial statement prepared in accordance with generally accepted accounting principles and include a review of the financial statement by an independent Certified Public Accountant (CPA).
- Those organizations with more than $1,000,000 in revenue in the most recently completed fiscal year are required to submit an audited financial statement prepared in accordance with generally accepted accounting principles and include the opinion of an independent certified public accountant (CPA) on the financial statement. They must also submit:
- A management letter (from the auditor to management regarding internal controls).
- A management representation letter (from management to auditor confirming responsibility).

Fiscal Agent Agreement

Other nonprofit organizations may serve as fiscal agents for programs funded by UWRC. In all such cases, the same clear and fully accountable stewardship required through direct application from nonprofit relative to program budgets and reporting is required of the fiscal agent. UWRC's Community Investment Committee (CIC) has the authority to approve procedures and financial reporting requirements that may differ depending on the nature of the partnership. A written agreement for fiscal responsibilities must be submitted annually. UWRC must be notified immediately in writing of any changes to the agreement.

Breach of Agreement

In the event that United Way of Racine County believes that a funded organization has engaged in a material breach of the funding agreement, including a material breach of an obligation specified in the community investment policies and procedures, United Way of Racine County shall provide the organization with written notice of the alleged breach.

If the organization fails to cure the alleged breach to United Way of Racine County's satisfaction within thirty days after notice thereof, United Way of Racine County may

provide the organization written notice of its intent to terminate this agreement, along with the reasons therefore.

If the organization desires to contest a notice of intent to terminate given by United Way of Racine County, the organization may submit an appeal to United Way of Racine County within fifteen days after the date of the notice, and the funding agreement shall remain in full force and effect until the United Way of Racine County Board of Directors acts on the matter.

Providing Feedback

UWRC acknowledges that it is valuable to provide constructive feedback regarding community investment process. UWRC values and encourages robust discussion with its funded programs.

All concerns must be directed to the president and CEO. Funded organization must refrain from engaging in any verbal or written communications that disparages or in any way discredits UWRC. If UWRC finds supporting evidence that an organization engaged verbal or written communications that disparages or in any way discredits UWRC, the action is considered a breach of agreement. The severity of the message may result in immediate discontinuation of funding.

Deadlines and Extensions

Submission Policies

The UWRC funding agreement requires organizations that receive UWRC funds to file a number of documents with UWRC at specified deadlines. It is the organization's responsibility to view their organizational profile in eCImpact for individual deadlines throughout the year.

Deadlines

Organizations are responsible for meeting specific submission deadlines for all compliance documentation:

- Signed agreements
- Revised budgets
- Most recent financial review or audit with management letter and management representation letter (from management to auditor confirming responsibility)
- Monthly demographics and outputs (if applicable) reports
- Quarterly indicators report (if applicable)
- Year-end report
- Other materials requested by UWRC staff, CIC and/or volunteer advisory teams

The filing dates of compliance documents and required reports are listed within the organizational profile in eCImpact. If the organization fails to submit the document/report within the allotted time, this is considered a breach of agreement.

Repeatedly missing submission deadlines, and/or late and/or incomplete reports may negatively impact the organization's eligibility for future United Way of Racine County funding.

Extension Request Process and Expectations

If any organization finds that it will be unable to meet a deadline, it may request an extension of no more than 90 days. The request must be submitted by email to UWRC at least five business days prior to the existing deadline and explain with specificity the reasons for the request and the proposed extension date. The request should be sent to both the community investment director and the data and compliance director (mkallio@unitedwayracine.org and tfeest@unitedwayracine.org).

Requests for extensions beyond 90 days may be considered with extenuating circumstances. Such requests must follow the procedure explained above.

The community investment director, chief operating officer, president and CEO, and/or CIC have the authority to approve filing deadlines on compliance documents/required reports. The decision to grant the extension will be solely with the discretion of UWRC.

Written approval or denial of requests for extensions will be sent to the organization via email. With an approved extension, the organization allocation will not be held for that month.

If the required document/report is not submitted, or if an extension request is not approved and/or if it is over 90 days after the extended deadline, the allocation(s) being held are forfeited, and future allocation payments are forfeited.

Funded Program Conditions

Revised Budgets

Any program receiving less than the amount requested in the proposal must submit a revised program budget via eCImpact. Program revised budgets are due August 26 with explanation of the revisions noted in the budget narrative section of the proposal.

After August 26, the organization must notify UWRC about any additional significant revisions to program or organizational budgets and revised budgets must be uploaded to eCImpact compliance section: board-approved organization budget or program budget.

- This includes but is not limited to staff salaries and benefits that reflect a 25 percent or more variance from original budget; a significant loss of anticipated revenue that affects program outcomes or the organization budget; the existence of a year-end program or organization deficit.

Refund Policy

UWRC has the right to request that unused funds or inappropriately used funds (not in accordance with program proposal and agreement) be returned.

Organizations have the responsibility to inform UWRC in a timely manner of significant changes in staff, in programming, or in the overall organization that may result in unused UWRC funds.

If an organization or fiscal agent organization identifies unused funds at the close of its fiscal year, such funds are to be returned to UWRC. Funds must be returned to UWRC by August 15, 2025.

Program Changes

The program must obtain written approval from UWRC for significant changes in program activities, scope of service and target population for programs receiving UWRC support. The program must notify UWRC of significant changes in staffing (both organization leadership and program staff) levels that impact program delivery. Failure to do so may result in immediate discontinuation of funding.

Ongoing Data Review

Volunteer advisory team members receive and review program reports. Implementation of program activities, use of program budget dollars and achievement of outcomes/outputs or outcomes as outlined in the proposal and

compliance with current guidelines in the current allocation cycle will be taken into consideration when future proposals are reviewed.

UWRC will conduct a progress review within the first five months of programming. The progress review includes a check of eligibility/compliance documents, a review of submitted program reports, and a discussion about the successes and challenges experienced to date. Progress reviews may include site visits to see the program in action, meet clients and collect success stories. The organization's executive director and key program staff attend the progress review. Progress reviews will be scheduled using eCImpact.

Essential services impact partners will have the opportunity to educate the essential services volunteers on their program though a presentation and/or site visit during the two-year funding period. These educational opportunities will be scheduled using eCImpact.

Program Reports

2024-25 Reporting Deadlines

Revised budget and narrative	Monthly report: demographics and outputs (if applicable)		Quarterly: outcome and indicator report	Year-end program budget and narrative
Aug 26, 2024	Aug 26, 2024	Feb 26, 2025	Oct 26, 2024	Aug 15, 2025
	Sep 26, 2024	Mar 26, 2025	Jan 26, 2025	
	Oct 26, 2024	Apr 26, 2025	Apr 26, 2025	
	Nov 26, 2024	May 26, 2025	Jul 26, 2025	
	Dec 26, 2024	Jun 26, 2025		
	Jan 26, 2025	Jul 26, 2025		

If a submission deadline is missed and/or required documents/reports are not submitted by the deadline and extensions were not approved, the allocation for the next month will be held. The allocation will be released in the next month if the program returns to good standing. For example, if an organization does not submit their August report by September 26, the allocation will not be released until November 7, provided the August AND September reports are submitted.

If the required document/report is not submitted, or if the extension request is not approved and/or it is over 90 days after the extended deadline, the allocation(s) being held are forfeited, and future allocation payments are forfeited.

Demographics
Required participant demographics include race, ethnicity, gender, age, geographic location, and socio-economic status. Participant demographics must be reported separately for general and LIFT programming. LIFT program demographics must be reported by school. <u>Demographics should include all clients served by the program, even if they aren't included in indicator data.</u>

Demographics should be collected and reported in a consistent way each month. Demographics may be self-reported by clients and/or pulled from vetted client data bases. At no time should program staff attempt to identify client demographics only by observation of, or interaction with, clients.

If a client declines to provide some or all demographic information, they should be reported in the "prefer not to say" category. An explanation can be provided in the narrative section. For example: "Fifty clients received financial counseling this

month. Three individuals declined to respond to the race section of the intake survey, so they are reported as 'prefer not to say'."

If demographic data is not available for some participants, use the "data not collected" category and provide an explanation in the narrative section. For example: "This support group is completely virtual. We ask participants to complete an anonymous demographic survey at the beginning of the six-week session. Of the forty participants, five did not complete the survey, so they are reported as 'data not collected'."

Participant demographics are reported in two ways each month.
- Monthly – unduplicated within that month
- Cumulative – unduplicated since July 1, 2024

Monthly demographics include everyone you served between the first and last days of each month. Monthly demographics are unduplicated within the month. Monthly demographics may vary by month. For example: if Client A receives services on July 5, July 22 and July 30, they are counted once in the July monthly demographics.

Cumulative demographics include everyone you served to date during the funding period (July 1, 2024 – June 30, 2025). Cumulative demographics are unduplicated, year-to-date. Once an individual is included in the cumulative demographics, they are not counted again in cumulative demographics, even if they are served in two different months. Cumulative demographics may remain constant from one month to another and may increase over the course of the funding period. For example: if Client A receives services in July and September, they are counted once in the cumulative demographics.

See the next page for an example of how to report monthly and cumulative demographics.

Example of Monthly and Cumulative Demographics

Month	Monthly	Cumulative
July (first month of the funding period) In July, you serve Ambrose, Benny, Ciara, Domingo and Ella.	Unduplicated number served this month: 5	Unduplicated number served to date: 5
August (second month of the funding period) In August, you serve Benny, Domingo and Ella.	Unduplicated number served this month: 3 Ambrose and Ciara are not included in August monthly demographics because they were not served in August. Ambrose and Ciara are included in August cumulative demographics because they were counted in July and carry over throughout the funding period. Benny, Domingo and Ella were counted in July and carry over throughout the funding period. They are not counted a second time in the cumulative number.	Unduplicated number served to date: 5
September (third month of funding period) In September, you serve Ambrose, Domingo, Fred and Gina.	Unduplicated number served this month: 4 Ambrose is back! They are counted in the September monthly number, but they are not counted again in the cumulative number because they were already counted in July. Fred and Gina are added to the cumulative number.	Unduplicated number served to date: 7

Monthly Outputs (essential services programs only)
Essential services program outputs are reported monthly using the same process as demographics.

Program outputs are reported in two ways each month.
- Monthly – unduplicated within that month
- Cumulative – unduplicated since July 1, 2024

Quarterly Indicators
Indicators are reported quarterly (unduplicated within the three months) and cumulative year-to-date (unduplicated since July 1, 2024).

Reporting of the successful attainment of indicators should align with the data collection method and frequency, and measure of success described in your proposal.

This means indicator data may not be reported for all participants included in the demographic data. This may also mean there will be months where indicator achievement is 0. In that case, use the narrative section to describe the reason an indicator is 0 and explain when that data will be available. For example: "A participant must complete a pre-survey and attend 18 sessions before we administer the post-survey. We are in week four of the program as of this report, so it is too soon to administer the post-survey. We have 47 participants on track to complete 18 sessions by the end of November."

General program questions
- Describe any changes or deviations in resources (activities, staffing, funding, space, etc.), that impacted the program this month.
- Is there anything else you'd like to report including upcoming activities, events, anticipated changes or success story?

Additional monthly report questions

In addition to the general program questions, the following questions must be answered. United Way of Racine County reserves the right to request additional information in monthly reports as needed with 30-day notice.

July
- Provide links to the program's (or your organization's) social media pages, if applicable:
    o Facebook
    o X/Twitter
    o Instagram
    o LinkedIn

September
- In 3-5 complete sentences, provide a specific example of how the program made an impact on a client or the community. This statement should clearly tie the impact to the indicators/outcomes selected in the proposal. If quoting a volunteer, staff member, or client, provide their name and title/role. You may use aliases when referring to clients to protect their privacy.
    o For example: "Pat has participated in Program ABC for four months. With support from their case manager, they set a short-term goal of finding a job and a long-term goal of saving for a down-payment on a reliable vehicle. They obtained employment in October and opened a savings account in November. They are on-track to purchase a vehicle by July."
- Showcase the program's achievement with images/photos.
    o Upload an image of program success and/or clients under attachments. UWRC may use the photos in social media, reports and/or other collateral that demonstrates the impact of the UWRC-funded program.

October
- Provide a link to the program's current listing on the Volunteer Center Get Connected database.
- Provide a link to the program's current listing on the IMPACT 2-1-1 database.
- If applicable, explain how programming and hours of operation will differ during the holidays.

November
- In 3-5 complete sentences, provide a specific example of how the organization successfully completed their UWRC campaign, including fun or new strategies implemented.

December
- Unduplicated number of people served to date in the first six months of programming. This should match your cumulative number served year-to-date.
- Describe progress in implementing your program as outlined in your proposal, including:
  - Hiring and/or program staffing
  - Participant recruitment/retention
  - Services provided
  - Program data evaluation
- Describe any general problems or delays the program is experiencing and efforts undertaken to resolve them.
- How has your program collaborated with other organizations/community partners? Describe how the collaboration benefited the program and the community.
- How is United Way funding integral to the program impact described in the previous question? This response may include a quote from staff or a board member.
- Is there anything else you want to report?
- In 3-5 complete sentences, provide a specific example of how the program made an impact on a client or the community. This statement should clearly tie the impact to the indicators/outcomes selected in the proposal. If quoting a volunteer, staff member, or client, provide their name and title/role. You may use aliases when referring to clients to protect their privacy.
  - For example: "Pat has participated in Program ABC for four months. With support from their case manager, they set a short-term goal of finding a job and a long-term goal of saving for a down-payment on a reliable vehicle. They obtained employment in October and opened a savings account in November. They are on-track to purchase a vehicle by July."
- Showcase the program's achievement with images/photos.
  - Upload an image of program success and/or clients under attachments. UWRC may use the photos in social media, reports and/or other collateral that demonstrates the impact of the UWRC-funded program.

March
- Donors want to understand the impact of their investment. Provide stats for this program for at least two of the giving amounts listed.
  - $1 per week ($52 per year)
  - $5 per week ($260 per year)
  - $10 per week ($520 per year)
  - $20 per week ($1,040 per year)

- In 3-5 complete sentences, provide a specific example of how the program made an impact on a client or the community this month. If quoting a volunteer, staff member, or client, provide their name and title/role. You may use aliases when referring to clients to protect their privacy.
- Showcase the program's achievement with images/photos.
  - Upload an image of program success and/or clients under attachments. UWRC may use the photos in social media, reports and/or other collateral that demonstrates the impact of the UWRC-funded program.
- In 3-5 complete sentences, provide a specific example of how the program made an impact on a client or the community. This statement should clearly tie the impact to the indicators/outcomes selected in the proposal. If quoting a volunteer, staff member, or client, provide their name and title/role. You may use aliases when referring to clients to protect their privacy.
  - For example: "Pat has participated in Program ABC for four months. With support from their case manager, they set a short-term goal of finding a job and a long-term goal of saving for a down-payment on a reliable vehicle. They obtained employment in October and opened a savings account in November. They are on-track to purchase a vehicle by July."
- Showcase the program's achievement with images/photos.
  - Upload an image of program success and/or clients under attachments. UWRC may use the photos in social media, reports and/or other collateral that demonstrates the impact of the UWRC-funded program.

June
- Unduplicated number of people served during the funding period (July 1, 2024 – June 30, 2025). This should match your cumulative number served year-to-date.
- Describe successes and challenges in implementing your program as outlined in your proposal, including:
  - Hiring and/or program staffing
  - Participant recruitment/retention
  - Services provided
  - Participant achievement of indicators/outputs
  - Program data evaluation
- What is one lesson learned through the evaluation of the program data, and how will that information be used to improve the program?
- In 3-5 complete sentences, provide a specific example of how the program made an impact on a client or the community. This statement should clearly tie the impact to the indicators/outcomes selected in the proposal. If quoting a

volunteer, staff member, or client, provide their name and title/role. You may use aliases when referring to clients to protect their privacy.

- o For example: "Pat has participated in Program ABC for four months. With support from their case manager, they set a short-term goal of finding a job and a long-term goal of saving for a down-payment on a reliable vehicle. They obtained employment in October and opened a savings account in November. They are on-track to purchase a vehicle by July."
- Showcase the program's achievement with images/photos.
  - o Upload an image of program success and/or clients under attachments. UWRC may use the photos in social media, reports and/or other collateral that demonstrates the impact of the UWRC-funded program.
- How is United Way funding integral to the program impact described in the previous question? This response may include a quote from staff or a board member.
- What are you most proud of from the funding year?

Year-End Budget Report

A year-end program budget and budget narrative report is due by August 15, 2025.

Organization Collaboration and Partnership Recognition

Collaboration
Funded programs are encouraged to seek appropriate opportunities to collaborate with other organizations, both public and private, in an effort to address community issues in the most effective and efficient manner.

At a minimum, United Way-funded programs are required to complete the following:
- Provide and update organization and program information within the IMPACT 2-1-1 database.
- Provide and maintain organization and program information, including current volunteer opportunities/activities, with the Volunteer Center of Racine County's Get Connected database.

Impact Partner Engagement
Collaborate with UWRC throughout the year by attending/supporting/promoting UWRC events.
- Campaign Kickoff Event – August 8, 2024. Campaign kickoff is the public launch of our annual fundraising campaign.
- Campaign Victory Celebration – January 23, 2025. One complementary ticket is provided to each impact partner organization. The ticket may be used by a staff or board member; additional tickets may be purchased.
- Nonprofit development opportunities. UWRC strives to contribute to the nonprofit sector in Racine County by offering opportunities for organizations to build knowledge and capacity. Impact partners are encouraged to engage in these opportunities as they are announced.
- Volunteer projects and campaign activities. UWRC is frequently approached by local companies that need support in coordinating and implementing employee volunteer activities, and/or that want representatives from impact partners to speak at campaign events. UWRC staff will contact impact partners with these requests as they are received.

Branding and Messaging Guidelines
All logos and branding guidelines can be found on www.unitedwayracine.org/branding. The information on the webpage is designed to help impact partners fulfill their funding agreement requirements and, more importantly, to help impact partners and UWRC successfully co-promote their partnership. Impact partners are encouraged to submit materials using the UWRC logo for approval. If you have any questions about branding and messaging guidelines or want to discuss co-promotion opportunities, please contact Heather

Collier, Marketing and Communications Director, via email at hcollier@unitedwayracine.org or by phone at 262-898-2257.

United Way Logo and United Way Community Partner Logo
When using the United Way of Racine County logo and the Community Partner logo, follow these rules:

- The logo and artwork are fixed and cannot be altered in any way
- The localization should not be removed or altered in any way.
- Only use artwork from www.unitedwayracine.org/branding.
- To ensure integrity of the logo, do not make a copy of a copy of the logo.
- Do not reduce width to less than .75 inches for print or less than 90 pixels or 1.25 inches for digital applications.
- Do not stretch or compress the logo. In most programs, this can be done by holding the shift key as you resize the logo.
- When the United Way of Racine County logo appears with other logos, such as on a t-shirt or event program, it should be equal in size to the other logos.
- Full-color use of the logo is preferred, however one-color versions and grayscale versions are available at unitedwayracine.org/branding.
- CMYK logos are for print materials.
- RGB logos are used for digital purposes, including your organization's website and social media.
- If you are creating t-shirts, mugs or other products with the United Way logo, please contact us for a special imprint logo.

| Correct (web/digital) | Correct (web/digital) | Incorrect (no localization) | Incorrect (too small) |

Messaging Guidelines
United Way of Racine County should be recognized as a funder in all project-related materials, press releases and other media interactions. For example:

- (Project name) was funded by United Way of Racine County
- Special thank you to United Way of Racine County for funding (project name).
- Including *ABC Organization, Inc. is a United Way of Racine County 2024-25 Community Partner* in the organizational boilerplate.

Social Media

Whether an impact partner is using social media to promote awareness, raise funds, increase event attendance or share impact, identifying United Way of Racine County as a funder can be beneficial for both organizations. One of the best reasons for a nonprofit to use social media is to build a community for their supporters. It's a digital space for like-minded people. When you tag United Way of Racine County, it allows UWRC to share the post. That tag and share allows both communities to grow, introducing supporters of one organization to another organization. There will be some overlap between audiences, but it will be far more of a Venn diagram than a circle.

When you identify UWRC on your social channels, it is most effective if you tag us. Use the @ symbol before our social media handle, and the mention becomes a tag. Here are the United Way of Racine County social handles:
- Facebook: @UWRacine
- X/Twitter: @UnitedWayRacine
- Instagram: @unitedwayracinecounty
- LinkedIn: @United Way of Racine County

United Way of Racine County Annual Campaign

United Way of Racine County's community investment process is dependent on the results of the annual community campaign. Impact partners are expected to support the annual campaign.

Campaign Promotion

Acknowledge and promote the organization's partnership with UWRC to staff, volunteers and the public. Respond to request for speakers, displays, tours, and/or other donor education efforts. Collaborate in UWRC's media efforts/approaches, including sharing social media posts.

Organization Annual Campaign

Organizations can choose the campaign effort that best aligns with their size and capacity. In all cases, UWRC will provide an investor relations manager to act as a liaison during campaign activities. Campaign efforts should take place between September 1 and November 30 annually, and funds raised during campaign must be submitted to UWRC no later than December 31.

Each organization can select one or more of the following campaign options:
- Conduct a workplace employee campaign with organization leadership requesting staff participation. UWRC will provide paper donation forms or an online giving page.
- Host a fundraising event open to the public.
- Promote, attend and support a fundraising event open to the public hosted by another impact partner.
- Make a direct donation to the campaign from the organization.

Solicitation of Designations

Funded organizations must support undesignated giving to United Way. They are not to promote designations to their organization during the annual campaign or at any time throughout the year. This includes leveraging relationships to promote designations for your organization including but not limited to the following: board members, clients/participants, volunteers, staff, at United Way of Racine County presentations, and during United Way of Racine County-planned/facilitated volunteer projects.

Donor Designations

United Way of Racine County allows individuals who donate to the annual workplace campaign to designate their gifts to any United Way-funded organization that received a program award through the 2024-25 annual investment request for proposal process or through the 2023-24 community workforce fund as identified on the annual campaign donor designation form. Organizations that use a fiscal agent are not eligible for donor designations. Organizations that serve as a fiscal agent for a UWRC-funded program are eligible for donor designations only if they also receive funding for one or more of their own programs.

Designations are accepted only for organizations receiving UWRC program funding through the annual investment request for proposal process and the community workforce fund.

- Designations to organizations funded through the annual investment request for proposals process will remain intact for up to but no more than two years after program funding ceases.
- Designations to organizations funded through the community workforce fund will remain intact for the campaign immediately following the investment year during which the grant was received.
    - Community workforce grantees funded during the 2023-24 investment year (July 1, 2023 – June 30, 2024) will be included on the 2024 designation forms.
    - Community workforce grantees funded during the 2024-25 investment year (July 1, 2024 – June 30, 2025) will be included on the 2025 designation forms.

Designation forms with pledges made to non-United Way funded organizations will be returned.

It is the employer's decision to offer donor designations to its employees. United Way will make every effort to accommodate company designation policies. Donor designation forms must be returned in the campaign report envelope along with the pledge forms. Donor designation forms must be turned in to United Way of Racine County by December 31 for processing or at an agreed-upon date between United Way of Racine County and contributing organization. Donor designations processed by an out-of-town employer will be honored if received by February 28. Incomplete or inaccurate forms will not be processed and will be returned.

Designators must use United Way of Racine County's donor designation form (available through the employee campaign coordinator or United Way of Racine

County office) or a compatible form designed by the company. The form must be properly completed, and the donor's signature is required.

Designators must pledge a minimum of $50 to be able to designate monies to an organization. If designations are made to more than one funded organization, a minimum of $50 must be pledged to each organization. A maximum of eight organization designations per donor is allowed.

Designated cash gifts to United Way of Racine County funded organizations must be paid in full. Designations made through payroll deduction are reduced by the annual anticipated pledge loss as determined by UWRC's finance committee. Deferred pledges are paid out based on actual collections.

Designated donations are paid out after the annual investment request for proposal review process has been completed. Members of the volunteer advisory teams are not advised of any organization-directed designation during the review process.

United Way of Racine County does not allow company-level donor designations. Matching company contributions will be used by United Way of Racine County in the general allocation fund.

Organizations receiving UWRC program funds will be provided a list of donor names and addresses of those who wish to be acknowledged. Donors must indicate their desire to be acknowledged on the designation form. Donors who do not want their names and addresses provided to organizations will be identified as "anonymous" to the organization receiving the designation.

United Way of Racine County has the right to verify each donor's pledge amount with the employer.

Exclusionary Designations
United Way of Racine County allows individuals who donate to the annual workplace campaign the ability to exclude certain organizations from the receipt of their donations. These donations are held and distributed separately from the unrestricted funds to assure that organizations that have been excluded do not share in the distribution of those funds. It is the employer's decision to offer exclusionary designations to its employees. United Way of Racine County will make every effort to accommodate company designation policies.

Designators must pledge a minimum of $50 to be able to designate exclusionary monies.

Exclusionary designations are tabulated as "zero dollars" to that organization(s). This is the same as a positive designation to all other organizations not excluded. The effect of the exclusionary designation will be a pro-rated reduction in the pool of dollars available to the organizations excluded. Volunteer advisory team members will not have knowledge of an organization exclusionary designation during the review process.

United Way of Racine County does not allow company exclusionary designations.

Donor Designation Payout Process
Donor designation information is processed by United Way of Racine County staff by the first week of March. Organizations are notified of donor designations by mid-March. The information provided to the organization includes the total amount of designations broken down by cash, payroll deduction and direct bill, the total number of donors and the names of donors who wish to be acknowledged.

Cash donations are paid in full to the organization on June 15. Payroll deduction pledges are paid out on June 15 and December 15. The payroll deduction pledges are reduced by the annual anticipated pledge loss as determined by UWRC's finance committee. The balance of the payroll deduction will be paid out equally on June 15 and December 15. The finance committee has the right to examine actual pledge loss by a company in extenuating circumstances and further reduce the pledge loss on donor designation payouts.

Deferred pledges are paid out on June 15 and December 15, based on actual collection of the pledge.

United Way of Racine County does not charge any administrative fee for donor designation pledges.