



CORPORATE & CAUSE PARTNERSHIP FACT SHEET

Thank you for your interest in becoming a Corporate or Cause Partner with United Way (UW), inclusive of United Way Worldwide (UWW), and multi-site local United Ways (LUW). We are one of the world's foremost, largest, and longest-serving nonprofit organizations and the leader in improving lives by mobilizing the caring power of communities. We envision a world where every person in every community is thriving. We aim to build strong, equitable communities where everyone can thrive by focusing on youth opportunity, healthy communities, financial security, and community resiliency.

UW is fortunate to have many leading companies supporting its mission, many for many years. These companies lead the way in employee giving, corporate investments, employee engagement, and cause marketing. UW collaborates with private, public, and nonprofit partners to tackle tough challenges and create community-based solutions.

The following guidelines are meant to provide potential partners with direction as requirements and procedures regarding partnering with UWW and LUWs. United Way is a federated organization, meaning that each LUW is a separate 501C3 organization as is UWW. United Way employs a Global Corporate Partnerships team that will work with you to create, execute, manage, troubleshoot, and evaluate a best-in-class partnership that has global and local impact in the communities that are important to your company and brands. Additionally, that team member will also provide more exact timing for your partnership based on the information provided and discussed. We look forward to welcoming you as a partner.

1. The mission of United Way is to improve lives by mobilizing the caring power of communities around the world. UWW will enter into partnerships for mutual benefit and for support of its mission and core impact areas.

- 2.** Brand reputation and protection are of primary concern with regards to partnerships of any nature. Building on decades of credibility, experience and expertise that exceed 135 years, UWW retains all rights and use of its brand. Corporate relationships must generate a positive impact on the UW brand. The marks of UW are not permitted to be used by a corporation or other entity without a written letter of agreement or contract without a written letter of agreement with UWW. LUWs are able to share their organization-specific marks according to their own individual policies.
- 3.** In all situations, UWW will retain the right to advocate on behalf of our constituents over the interest of our partners. UW does not endorse specific products, brands, or services in accordance with IRS guidelines as well as corporate partnerships and cause marketing best practices: UWW acknowledges, recognizes, and brings about awareness of our corporate partners. UWW may not direct or instruct the general public or donors to take specific actions outside of its normal business that results in benefit to United Way.
- 4.** When UWW enlists a company to advance its mission, that company and the particular partnership will be separately assessed based on various factors for alignment as well as to the combined benefits to UWW compared with any associated costs and risks. In most cases, the UWW representative working with the prospective company may need additional information from the prospective partner in order to proceed. UWW adheres to a thorough vetting and negotiation process and will work to ensure that in each case, relevant information is surfaced, and a wide area of functional and practical perspectives are represented. This internal review process may take up to 30 days. A contract typically takes an additional 10 business days. The exact timing of the contract, based upon the complexity of the partnership, will be discussed with the company by the Global Corporate Partnerships team member.
- 5.** When a partnership is approved that may bring about the potential for risk, messaging will be created and shared with all staff and a central point of contact will be determined for all communications and questions. Depending upon the exact nature of the partnership, other approvals may be necessary.
- 6.** UWW rarely enters into any blanket exclusive relationship with any company. Any exceptions must be approved by the Board of Directors and require a significant long-term investment to be considered. Time-limited, property-specific and/or program-specific exclusive sponsorships and partnerships may be granted. Additionally, any exclusive relationship with UWW does not extend to the entire Network, this local United Ways may have competing relationships in their local markets.

- 7.** Other provisions must be satisfied in relationships with companies and when the UWW name (and/or that of local United Ways) , logo or identifying marks are associated with commercial products or are distributed through commercial or retail channels, including the internet or social media. Exceptions may be granted, depending on circumstances.
 - A.** A minimum of one year in business is required for any company/organization that is seeking partnership with UWW. The exception to this rule is if the, or a substantial portion (50%+), of the minimum guaranteed donation is paid up-front.
 - B.** The corporation should be financially stable and viable. Additional supporting documentation may be required from the corporation.
 - C.** Precautions must be taken to ensure proper control and complete implementation of the project at the franchise or local level. Since the relationship is with the company, not its advertising or public relations agency, UWW must have access to the appropriate level of decision-makers within the corporation, even when a third party is involved. If third parties are involved, there must be effective control or protection of UWW's interests. If the corporation's sales force or other groups are involved, they should have clearly identified and realistic responsibilities with proper training and messaging taking place so that they represent UWW and the partnership or promotion accurately.
 - D.** The partnership or promotion should not be averse to an existing relationship of UWW.
- 8.** UWW will not enter into partnerships where the main (sole) focus is on securing new customers for the company or when the main mechanism for the partnership requires actions from UWW, its database, its volunteers or the same from the local United Ways.
- 9.** UWW will not participate in corporate voting contests benefiting the/a/some nonprofit organization(s) where the organization receiving the most consumer votes receives a premium, except when there is a minimum guaranteed contribution of at least \$50,000 to UWW.
- 10.** Volunteering programs organized with and through UWW, and involving local United Ways, operate on a fee-for-service model, requiring an investment of time and resources to cover all material and operational costs for the volunteer activities, core support of the mission, coordination and management of the program and to ensure a positive experience at the global, national, and local levels.

Core support is generally considered to be 15% as outlined and an overall partnership minimum is required, as outlined below. Volunteer needs vary by market but most nationally and globally coordinated activities center around kit building for distribution to agencies and individuals. Volunteer programs require a minimum of 90 – 180 days to launch and coordinate, from the date of execution of the agreement.

- 11.** One of UWW’s primary objectives, with all marketing, corporate and cause marketing programs, is to ensure that consumers are provided with the best information about how to access and receive services and a way to contact UWW, and its affiliates, or the local United Way for further information. The UWW website(s) must be included, and additional agreed upon messaging on all promotion, events, impact areas, programs, and services wherever possible to raise awareness and educate the public about services provided and available to them. We suggest inclusion of educational/informational messages on packaging, in promotional, advertising, and collateral materials to ensure that a company’s partnership will raise awareness and educate the public at large as well as consumers. We offer a comprehensive suite of resources to assist in these efforts.

- 12.** UWW has restrictions for working with several types of companies including, but not limited to gambling, tobacco, cannabis, alcohol, food and beverage, pharmaceutical and nutraceutical.
 - A.** UWW will not partner with a tobacco brand or cannabis company under any circumstances.
 - B.** UWW will not partner with a gambling company, including casinos and other betting services and sites. UWW may coordinate multi-site employee engagement activities and campaigns.
 - C.** Partnerships with alcohol brands and their parent companies may be permitted under certain circumstances but the promotion or partnership may not be based on consumption or donation with purchase. Without exception, alcohol brands and parent companies may not sponsor any specific UWW programs or materials. UWW may coordinate multi-site employee engagement activities and campaigns.
 - D.** UWW may partner with food and beverage companies but may restrict any messaging about health claims and require disclaimer language.
 - E.** UWW may partner with pharmaceutical and nutraceutical companies, and their products, but may restrict any messaging about health claims and require disclaimer language.

Your Global Corporate Partnerships representative will be able to answer specific questions and explain appropriate restrictions.

- 13.** UWW employees, local United Way staff, Board members, and other constituent audiences will not be involved in the direct sale or promotion of products, goods, or services.
- 14.** UWW will not approve partnerships that are wholly, or primarily, predicated on sales of products to its constituents, staff, employees, partners, or Board Members, nor to the same with local United Ways.
- 15.** UWW will not approach its current partners for the distribution or sale of products or services.
- 16.** UWW will not approach its current partners to support an initiative, partnership, program, or fund of another partner.
- 17.** UWW sometimes finds that partnerships proposed are better suited for a local program versus a larger national or global program or fall under the auspices of a small fundraiser, rather than a national, global, or multi-market partnership. If the partnership is considered to be more appropriate for a local program, it will be referred to the appropriate local United Way for consideration. A representative of that local United Way will contact the prospective partner directly. Each local United Way may have the same and/or additional stipulations to partner.
- 18.** UWW national, and most multi-market corporate partnerships have a minimum investment of \$100,000. The exact donation will be determined based upon the nature of the partnership, promotion, geographic reach, benefits delivered, expectations of both parties and other parties. Event sponsorships have different pricing structures. All partnerships must support the overall mission of the organization in addition to the exact particulars of the program, promotion, or partnership. Donations from employees through workplace-based employee campaigns may not be considered part of a minimum investment.
- 19.** UWW cause marketing partnerships require a minimum investment of \$50,000. No relationships will be considered on speculation, maximum investments may be stipulated. All companies must disclose the exact donation, or its calculation, to the consumer in accordance with all laws and best practices. All funds derived from cause marketing initiatives are unrestricted funds and support the overall mission of the organization.

It is important, most effective, and the best industry practice that the donation amount for a product promotion or a flat corporate donation is significant in the minds of the consumer to have maximum impact and reflect a true commitment on the part of the company. The exact donation will be determined based on the nature of the partnership, promotion, geographic reach, benefits delivered, and expectations of both parties and other parties. The exact minimum guaranteed donation will be determined by the Global Corporate Partnerships team member in discussion with the company. A portion of the funds will be passed through to local United Ways in accordance with internal policy. Donations from employees through workplace-based employee campaigns may not be considered part of a minimum investment.

- 20.** All corporate and cause partnerships require support from the Worldwide office which coordinates, collaborates, connects, gathers data and impact, evaluates, and reports on partnerships and promotions. All partnerships must support the overall mission of the organization in addition to the exact particulars of the program, promotion, or partnership. A portion of the minimum investment, not to be less than 15% for corporate partnerships and 25% for cause marketing partnerships, funds the core support that is needed to execute and manage these relationships, partnerships, and promotions as well as support the overall mission of the organization. Partnerships requiring international distribution of funds require different core support investments. The exact amount for any partnership will be determined by the Global Corporate Partnerships team member in discussion with the company.
- 21.** Most cause marketing partnerships and promotions require a minimum of 90 days to execute, with 180 days for point-of-sale campaigns, from the date of the execution of the agreement, ensuring that proper education about, and communication of, the partnership or promotion, for both parties. Timing of these types of partnerships and promotions depends on many factors with UWW, LUWs and the company.
- 22.** A company that conducts a national or multi-location program/promotion with UWW and/or LUWs may be required to register in certain states as a “commercial co-venturer.” In its simplest terms, a commercial co-venture is a relationship where a company promotes a product or service and represents to the public that a portion of proceeds will benefit a cause/nonprofit organization. If the product or service is being promoted in a state that requires commercial co-venturer registration, the company conducting the program/promotion must file certain documents with the state’s Attorney General’s office (or other state-designated entity). The specific documents that must be filed vary from state to state, and change often, but will generally include a registration statement and a copy of the contract executed.

Although UWW cannot give legal advice to companies that conduct programs/promotions with us, we do advise all to speak with legal counsel to ensure that they comply with these registration requirements. There are firms that specialize in these types of matters. UWW may also be required to file in certain states and will do so as necessary. UWW may also request proof of the registration of the company.

- 23.** UWW does require a written, agreed upon, and executed contract (letter of agreement) before use of its marks, messaging, or any associated images, or partnership commences, by any partner. No contracts are permitted that self-renew, although multi-year contracts are permitted and encouraged for continuity.
- 24.** If possible, please forward a company media kit and any other collateral, brochures, reports, etc. about your company or the partnership/promotion proposed that will assist us in evaluating your proposal. Send to: United Way Worldwide, ATTN: Development/Global Corporate Partnerships, 701 N. Fairfax Street, Alexandria, VA 22314.