

Donor Choice

Designation Policy Purpose

To help United Way Alliance of the Mid Ohio Valley fulfill its mission as it relates to meeting human service needs and making long-lasting positive changes to improve the MOV's quality of life. United Way promotes the Community Impact fund as the most effective way to invest in our community's future. This policy is to be used as a guide to respect each donor's choice and only applies to gifts processed by UWAMOV. Many donors prefer supporting United Way's goals related to education, income, health and basic needs and understand these goals are directly related to the community's social needs and issues. By not designating your gift or selecting the Community Impact fund or one of its focus areas, you mobilize the caring power of our community. You can give to United Way with the confidence that we will ensure each donation is invested wisely where it will have the greatest impact. United Way understands that some donors choose to direct a portion of their gift to a specific agency. Donor-directed contributions are processed as a service to donors however United Way is unable to guarantee how designated funds to a specific agency will be used or ensure measurable results by the recipient agency.

Designations to the Community Impact Fund

- Dollars given to this option go to the Community Impact Fund for distribution to United Way and its funded partners. Local volunteers who make up the UWAMOV's Community Investment Committee recommend to UWAMOV's Board of Directors how much each funded partner receives. These recommendations are based on an objective review of programs, services, budgets, community needs, and the availability of funds. No processing fee is assessed on this option.

Guaranteed Gifts to United Way Funded Partners

- Designations to UWAMOV's funded partners are accepted and identified as "guaranteed gifts". The funded partner is guaranteed to get at least the amount that donors specify to them, regardless of the outcome of the campaign. If an agency's total guaranteed gifts exceed the funding pre-approved by the Community Investment Committee, the excess will also be distributed to that agency. These funds are unrestricted as to their use by the agency. They are not subject to specific program application and United Way can provide no oversight as to their use.
- No processing fee is charged on guaranteed gifts.
- Depending upon campaign and designation results, adjustments may be made to funded partners' allocations in December prior to the funding year beginning in January.

Designations to Other United Way Organizations

- Many people who work in Our region prefer to send a portion or all of their contribution to a hometown United Way operating in another county or state. Our United Way will forward this contribution as a service to the donor.
- Before payment, all designated contributions received will be adjusted appropriately to reflect collection loss.
- No uncollectable fee will be taken from cash and check contributions.
- No other fees will be assessed.
- The schedule of disbursements of designations will comply with United Way Worldwide's Membership Standards.

Designations to Non-Funded Partner

A non-UW funded partner must qualify for receipt of funds through the UWAMOV by meeting all of the following requirements:

1. Have received a certificate of tax exemption under Code 501 (c) (3) or under 501 (c) for 501 (c) (3) purposes from the I.R.S. Other non-profit organizations may be considered if other requirements are met.
2. Be registered and able to provide applicable state registration as a not-for-profit organization.
3. Compliance with Anti-Terrorism Agreement
4. The agency must provide upon request copies of these certificates to the UWAMOV prior to distribution of designated funds to the agency.

**If not met, the designations will be distributed to the general community impact fund.

- Designations to non-funded partners will be processed as follows:
 - Because of the costs involved in processing these designations, United Way requires a \$50 minimum contribution to exercise this option. Designations not meeting this minimum requirement will be distributed through the Community Impact Fund.
 - The number of agency designations a donor may make will not be limited, but the \$50 minimum contribution applies to each designation.
 - A processing fee will be assessed on every designation. The fee includes processing costs, not to exceed the three-year average calculated from the most recently filed 990 tax forms.
 - No uncollectible fee will be taken from cash and check contributions.
 - Before payment, all designated contributions received will be adjusted appropriately to reflect collection loss.
 - The schedule of disbursements of designations will comply with United Way Worldwide's Membership Standards.
 - Designation payments to non-funded partners will be mailed quarterly, unless that agency's designations total \$200 or less. In those cases, the amount would be paid in full- minus processing and uncollectible fees – in one payment.
 - Although we process contributions to non-funded partners as a service to our donors, UWAMOV is unable to guarantee how designated funds to a specific agency will be used or ensure measurable results by the recipient agency. These funds are unrestricted as to their use by the agency. They are not subject to specific program application and United Way can provide no oversight as to their use.
 - Gifts Made By Payroll Deduction (Via Workplace Campaigns) United Way can only distribute dollars that are actually collected. Therefore, on payroll gifts additional costs are subtracted to cover the loss of uncollected pledges. United Way is given a lump sum from employers versus individual checks and thus is unable to know specifically which payroll pledges are unfulfilled
 - Pledge payments are applied based on the information provided by the company or pledge processor. If payments are not identified by individual donor then they are applied across all donations within the organization based on percent of total. Any payment shortage due to uncollected pledges will be spread proportionately and may affect designation payouts. United Way anticipates a certain percentage of all payroll deduction pledges will not be fulfilled. This percentage (referred to as shrinkage) is reviewed each year and adjusted based on current year and prior history of fulfilled pledges. Gifts Made By Check, Cash, or Credit/Debit Card: If you make a gift by cash, check, or credit/debit card, the uncollectible allowance does not apply.

- Tocqueville Leadership Giving: United Way will not apply fundraising and administrative costs from leadership gifts of \$10,000 or more if at least 75% of the gift is unrestricted (not designated).
- United Way will deduct fundraising and administrative costs to cover the cost of fundraising, collecting, processing and distributing donations. This fundraising and administrative amount is determined annually using information from the most recent 990 and an approved formula. For most current 990 and audit please refer to “About Us” on our website at uwamov.com

Designation not accepted by UWAMOV

- Designations for cultural, educational institutions, religious, or political purposes cannot be honored, nor will gifts to capital campaigns. Some examples of organizations and activities, though worthy of public support, that fall outside the definition of services include: churches and synagogues; schools and colleges; private or public foundations; cultural organizations; environmental organizations; political action committees; organizations whose sole purpose is advocacy.

Recognition as Pacesetters/Leadership Giving

- United Way *Pacesetters* is a powerful, elite group of local business, civic and philanthropic leaders who share a passion for investing in the community and making a difference with their annual gifts of \$500 or more. When you join the *Pacesetters*, you demonstrate your leadership and deep level of commitment to the transformation of the Mid-Ohio Valley

Pacesetters Annual Giving Levels

Tocqueville Society:

Contributions of \$10,000 and above

Visionary (Platinum):

Contributions of \$5,000 - \$9,999

Gold:

Contributions of \$2,500 - \$4,999

Silver:

Contributions of \$1,000 - \$2,499

Bronze:

Contributions of \$500 - \$999

Donors are recognized as Pacesetters only when gifts are directed to United Way. Purchase of event tickets, fundraiser participation, auctions etc. are NOT considered eligible gifts for Leadership Giving status.

