



United Way Alliance of  
the Mid-Ohio Valley

## United Way Alliance Donor Choice Policy

United Way Alliance of the Mid-Ohio Valley has a wide-choice donor designation policy that is defined as one that offers designations to other United Ways, a citizen's review process, funded partner programs, and unaffiliated agencies.

One of the strengths of the United Way system is the investment process by which local volunteers and board members distribute the resources generated by United Way. Volunteers decide the amount of money specific human service programs will receive. These decisions are based on the values outlined by United Way that consider client need, the program's demonstrated ability to achieve positive results for the people it serves, how well the program aligns with United Way's mission and strategic intent, how effectively the program uses resources to achieve the desired results, and the efforts toward continuous learning and program improvement.

Through the investment process, each contributor's gift is invested in the community, helping people who need help the most. Measuring results and verifying outcomes demonstrates accountability for the effective use of the monies. In this manner, each contribution achieves the greatest benefit possible.

However, we also believe our contributors have the right to determine how their United Way gift will be used. While most contributors want to invest in the community fund and rely on the allocations process to ensure their contributions are used wisely, where they are most needed and will do the most good, some contributors want to designate all or part of their gift to a particular human service agency. By respecting each contributor's right to give freely, we believe our donor choice policy will work for everyone.

The following guidelines should be useful to those interested in designating funds outside of the United Way general campaign (community impact fund).

### **General Information**

Neither designations to non-funded partners nor designated gifts to United Way funded partners will be encouraged. Contributing to the Community Impact Fund (general campaign) will be promoted in all written and electronic campaign materials.

Donors making gifts of \$500 or more to the United Way Alliance general campaign (Community Impact Fund) or a current, funded partner will be recognized as members of the UWAMOV Leadership Giving Association, known as Pacesetters.

This policy does not apply to state and federated campaigns.

### **Designations to the Community Impact Fund (general campaign)**

Dollars given to the Community Impact Fund are allocated to United Way community initiatives and its funded partners and follow the standard allocation process managed by

the Board of Directors Community Investment Committee.

### **Designations 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. In the event a funded partner's guaranteed gifts exceeds the funding approved by the Community Investment Committee, the excess will also be distributed to that agency. Guaranteed gifts that exceed the funding approved by the Community Investment Committee are unrestricted as to their use by the agency, and United Way can provide no oversight as to their use.

### **Designations to Other United Way Organizations**

Some people who work in UWAMOV served counties 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. The schedule of disbursements of designations will comply with United Way Worldwide's Membership Standards.

Contributions to other United Ways are not contributions to the Community Impact Fund. Consequently, the UWAMOV provides no oversight to the use of those contributions and is unable to guarantee how those contributions will be used.

### **Designations to Non-Funded Non-Profit Organizations**

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

- Have a current certificate of tax exemption under Code 501(c)(3) or (4)
  - *Non-profits classified as a 509(a)(1) or similar classifications may also be eligible, though additional documentation may be required*
- Be registered with the Secretary of State for WV or hold the equivalent applicable state registration as a not-for-profit organization.
- Comply with Anti-Terrorism Agreement
- The organization will be strongly encouraged to enroll in our ACH process to expedite the transfer of funds and reduce the work on UWAMOV staff to process the designations.
- The agency must provide (upon request) copies of these certificates to the UWAMOV prior to disbursement of designated funds to the agency.

Designations to Non-Funded Organizations will be processed as follows:

- Contributions to non-funded organizations are not contributions to the Community Impact Fund. Consequently, the UWAMOV is unable to provide oversight or guarantee how designated funds to a specific agency will be used by the recipient agency. These funds are unrestricted as to their use by the agency and are not subject to specific program application.
- Because of the costs involved in processing these designations, **UWAMOV requires a \$250 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 \$250 minimum contribution applies to each designation.
- The schedule of disbursements of designations will comply with United Way Worldwide's Membership Standards.
- Designation payments to non-funded organizations will be distributed quarterly.

**Designations not accepted by the UWAMOV**

Designations for religious or political purposes cannot be honored, nor will gifts to capital campaigns. United Way Alliance reserves the right to refuse funds which are designated to entities that it believes are not consistent with its mission.

*Policy approved by the United Way Alliance Board of Directors on March 16, 2016 and effective beginning April 1, 2016.*