

United Way of Marion County Donor Choice Policy



General Information

- Neither designations to non-funded partners nor guaranteed gifts to United Way funded partners will be encouraged. Contributing to the Community Impact Fund will be promoted.
- However, the Board of Directors of the UWMC recognizes that some people who participate in the annual campaign want to have a choice in how their United Way gift is directed. Therefore, the UWMC provides a variety a donor options. They are outlined in this policy.
- Donors making gifts of \$500 or more through any option will be recognized as members of the UWMC Leadership Giving Society.
- Pledge card design will allow donors to indicate if they wish for their name to be released to the designated agency, whether a funded partner or not. If the donor chooses to have their name released to the agency designee, the United Way has no control over how this information will be used.
- This policy does not apply to state and federated campaigns.

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 UWMC's Community Review Committee recommend to UWMC'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 UWMC's funded partners are accepted and identified as "guaranteed gifts" with disclosure on the donor pledge card of how funds are handled. 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 Review 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.
- UWMC funded partners will be asked to report all resources to the Community Review Committee, including those designations received from other United Ways.
- A negative designation to a funded partner is offered but not encouraged.

Updated: May 9, 2018

Approved- Executive Committee- May 21, 2018

Designations to Other United Way Organizations

- Many people who work in Marion County 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. The uncollectible fee will be calculated based on actual collections from the company.
- 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 Health and Human Services Organizations

- A non-UW funded partner must qualify for receipt of funds through the UWMC by meeting all of the following requirements:
 1. Be a direct provider of health and human services.
 2. 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.
 3. Be registered with the Secretary of State for WV or hold the equivalent applicable state registration as a not-for-profit organization.
 4. Compliance with Anti-Terrorism Agreement
 5. The agency must provide upon request copies of these certificates to the UWMC prior to dispersal of designated funds to the agency.
- 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 uncollectible fee will be calculated based on actual collections from the company.
 - The schedule of disbursements of designations will comply with United Way Worldwide's Membership Standards.

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- 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, United Way of Marion County 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.

Designation not accepted by UWMC

- Designations for cultural, educational, 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 the term "health and human services" include: churches and synagogues; schools and colleges; libraries; private or public foundations; cultural organizations; environmental organizations; political action committees; organizations whose sole purpose is advocacy.