

United Way of the Cape Fear Area Donor Designation Policy

Purpose of the Donor Designation Policy

The purpose of the Donor Designation Policy is to define the choices available to United Way of the Cape Fear Area (UWCFA) donors. Donors have the option of designating part or all of their contributions to other United Ways or to eligible agencies, programs, and causes providing for critical community needs such as health and human services, in the jurisdiction of the UWCFA.

In support of Community Impact, the most effective way for donors to address the critical needs of the community is to contribute an unrestricted gift through the annual campaign.

UWCFA has no policy role in SECC or CFC campaigns.

I. Designation Options

- a. There are four donor designation options:
 - 1.) undesignated or unrestricted gifts,
 - 2.) Community Impact,
 - 3.) specific eligible agency, or
 - 4.) United Way

II. Undesignated Contributions

- a. Undesignated contributions are preferred because it positively affects the UWCFA's ability to address the highest priority needs identified by our community.

III. Eligible Designations

- a. Agencies eligible to receive designations are considered community partners and must:
 - 1.) Provide health and human services, or educational services in the jurisdiction of the UWCFA to include national non-profit organizations with a local presence;
 - 2.) Be tax-exempt under the Federal Internal Revenue Service Code, Section 501(c)(3); and
 - 3.) Be able to show proof of compliance with the USA Patriot Act through the completion of the Counterterrorism Compliance Form
- b. Designations must be for the agency and not a specific program or a capital project
- c. Designations can also be made to another United Way.
- d. The Board of Directors may override policy restrictions on designated contributions on a particular proposal.
- e. Designated gifts must be at least \$100 per designation.

- f. Agency participation eligibility in SECC or CFC is determined annually by the requirements set forth by the Combined Campaigns.
- IV. Ineligible Designations
- a. Donors who make designations outside the mission and purpose of the UWCFA will be contacted and every eligible choice will be presented. If the donor does not agree to re-direct his gift, it will be returned to him/her.
 - b. Corporate gifts cannot be designated.
- V. Promotion of Agency and/or Donor Designation
- Agencies will:
- a. Consult and work with UWCFA on matters of common interest in an effort to achieve the best interest of the community as a whole.
 - b. Increase the public's understanding and participation in human service programs by working collaboratively to promote the UWCFA system and its community partner agencies.
 - c. Act as a partner with UWCFA by representing it in a positive manner, and be a proactive supporter of UWCFA and its community-wide visibility.
 - d. Promote the Community Impact Agenda, including the primary areas of critical need and the UWCFA's efforts in addressing those issues. **This includes supporting the Community Campaign, and refraining from asking for direct agency designations.**
- VI. Administrative Process of Designated Gifts
- a. All designated gifts will be adjusted for administrative fees (fundraising and financial management) and collection losses based on the prior fiscal year's actual experience as reflected in the UWCFA audit.
 - b. The UWCFA Board may set the fees at an amount less than actual, but not more than actual costs as set forth in United Way of America's Membership Standard M.
 - c. There will be no administrative fee for Tocqueville leadership donors (\$10,000+).
- VII. Payment of Designated Gifts
- a. Cash designations are net of administration fee and will be paid with the first of the quarterly payments.
 - b. Quarterly payments can be expected to begin no later than July 1st.

- VIII. Workplace Campaign/Employee Campaign
- a. Each workplace campaign will have at least one Employee Campaign Coordinator (ECC).
 - b. The ECC is responsible for providing ample opportunity for all employees to learn more about the United Way and the UWCFA annual campaign.
 - c. The ECC is responsible for completing any necessary paperwork and giving a timely report on their Workplace/Employee Campaign. Each Campaign will be scheduled to fit the workplace and a scheduled reporting system will be decided and agreed upon (between the workplace, ECC and UWCFA).
- IX. United Way of the Cape Fear Area's Responsibilities
- a. UWCFA will monitor its current policies and may make future policy changes as needed.
 - b. UWCFA will promote and manage, through an equitable process, community partner agencies' access to employee donors of workplace campaigns that involves agency speakers, tours, volunteer opportunities, service access, and other programs as needed.
 - c. UWCFA will proactively position the United Way as the best choice to help the most people through a comprehensive communications plan that includes the public and the workplace campaign.
 - d. UWCFA will provide training in United Way communications to community partner agency representatives.
 - e. UWCFA will acknowledge donor gifts and provide tax receipts to donors.
 - f. UWCFA will notify agencies of the amount pledged to them at the completion of the campaign, usually by the end of May. The agencies will be provided a list of contributors and addresses of those who wish to be acknowledged by the agency.
 - g. Designated agency gifts may be taken into consideration during the overall funding process.
- X. Responsibilities of Community Partner Agencies Receiving UWCFA Funding in the Current Year or Within the Past Five Years
- a. Verify 501(c)(3) status.
 - b. Complete and return the Counterterrorism Compliance Form.
 - c. Verify that services are provided in the jurisdiction of the UWCFA.
 - d. Provide timely thank you letter to donor, if donor chooses to be known to the designated agency.
 - e. Provide timely reports as agreed upon when accepting funding.
 - f. Abide by this UWCFA Donor Designation Policy.

United Way of the Cape Fear Area Donor Designation Policy

At a meeting of the Board of Directors of _____ (name of agency) held on _____, (date) the board voted to accept the United Way of the Cape Fear Area's Agency Agreement.

Signature of Board Chairman

Signature of Executive Director

Print name of Board Chairman

Print name of Executive Director

Date

Date

Copy to Employee Campaign Coordinator *initial* _____ *date* _____

Copy to Campaign File *initial* _____ *date* _____

Please read the entire policy, complete and return this page to UWCFA, 5919 Oleander Drive, Suite 115, Wilmington, NC 28403.