

# UNITED WAY OF THE GREATER DAYTON AREA DONOR DESIGNATION POLICY

*Revised July 2021*

The primary purpose of the United Way of the Greater Dayton Area is to meet human service needs and find long-term solutions in the Dayton region through the community allocations process and impact areas. United Way of the Greater Dayton Area also offers choices to assist donors in meeting their philanthropic goals to support local health and human services.

## **Guiding Principles**

- I. The Donor Designation Policy is based on the following premises:
- Donor-designated gifts will be a separate source of funding from the grant process.
  - The processing fees associated with donor-designated gifts will be applied based on percentage of the total designated donation.
  - Agency eligibility to receive donor-designated gifts will be limited to those agencies providing a health or human service within a set geographic area to meet United Way's focus on the local community.
  - Agencies will agree not to solicit for designated gifts to ensure a fair and equitable process.
  - Regional and national employee campaigns designation policies will be honored.

## **Donor Designations**

To maximize the funds for the network of programs, services and agencies through the community grants, United Way of the Greater Dayton Area will actively promote gifts to the Strong Families initiative. This holistic approach will provide families with the support they need to move toward stability. A donor may designate 100% of their gift to United Way of the Greater Dayton Area, the Strong Families initiative, affiliated United Way of the Greater Dayton Area agencies and/or, any other United Ways in the United Way system. Individuals who wish to support the community grants *and* designate a portion of their gift to support any other eligible agencies may direct up to a maximum of 50% of their contribution (minimum of \$50) outside of the United Way network. All gifts to the Strong Families Fund will be processed before designations.

## **Agency Eligibility**

- II. The following types of organizations are eligible to receive donor designations:
- United Way of the Greater Dayton Area, the Strong Families initiative, and the three counties (Montgomery, Greene and Preble)
  - Affiliated Agencies of the United Way of the Greater Dayton Area
  - Other United Ways
  - Nonprofit organizations holding an IRS 501(c)(3) tax exempt status and providing health and human service programs to our geographic area and contiguous counties

All agencies receiving designations must provide a signed Patriot Act certification form annually.

An agency outside the United Way network must be able to demonstrate it provides a health and human service program and serves residents of the Dayton region or have a physical presence in one of the contiguous counties (Butler, Champaign, Clark, Clinton, Darke, Fayette, Madison, Miami, and Warren in Ohio and Wayne County, Indiana).

Self-promotion for designations by an agency is grounds for ineligibility. Failure to promptly address and adequately resolve issues of non-compliance will lead to disqualification.

### **Donor Acknowledgement**

- III. United Way confirms donor gifts through thank you letters sent to Leadership Circle (\$1,000 and up) donors. Postcards with the total donation amount only is sent to donors under the Leadership Circle amount. It is the responsibility of the agency to also acknowledge donor-designated gifts. United Way provides designation reports to agencies on a secure website by April each year. Agencies are informed and encouraged to check back periodically as not all national and regional accounts report their donor designations by the date of the first notification.

### **Administration of Donor Designations**

- IV. United Way of the Greater Dayton Area assumes the responsibility of administrating the Donor Designation Program on behalf of participating donors and eligible agencies. United Way processes payment to agencies quarterly, based on actual dollars received.

United Way will cap Donor Designation processing fees at 16% of actual dollars collected, with a \$750 maximum on any individual gift. Only collected amounts not pledges can be passed on to the agencies, so payments to the agencies are made quarterly as donations are received.

Pledge payments are applied based on the information provided by the company and/or payroll processor. If payments are not identified by individual donor, they are applied across all donations within the organization based on percent of total. Therefore, any payment shortage due to uncollected pledges must be spread proportionately and may affect designations.