

UNITED WAY OF THE MIDLANDS DONOR DESIGNATION POLICY

BACKGROUND OF DONOR DESIGNATION PROGRAM

United Way of the Midlands began accepting donor designations for non-affiliates in 1981. The United Way of the Midlands Board of Directors retains the authority for establishing donor designation policies. Oversight for the operation of the donor designation program, including determination of eligibility is through the Community Impact Department.

When a contributor designates all or part of his or her gift to an eligible agency, that gift will be transmitted, less a fee, to the agency according to the established procedures for designation. These designations will be treated separately from United Way grant funding.

POLICY ON CAMPAIGN DESIGNATIONS

1. United Way of the Midlands (UWM) will honor designations consistent with its mission to address basic needs and/or community-identified priority areas, as well as those organizations who fit the eligibility criteria listed below.
 - a Organizations that are subsidiaries of UWM grantees or are independent organizations that are deemed to be subsidiaries, as set forth by Generally Accepted Accounting Principles (GAAP), shall have their designations added to the grantee's designation.
 - b Designations to United Ways in other communities will be honored.
 - c To qualify for a designated gift raised through United Way campaign, an agency must meet the following eligibility criteria:
 1. Be located or provide service within the boundaries of the 21- County area covered by UWM, including: Douglas, Sarpy, Cass, Saunders, Washington, Burt, Dodge, Nebraska, and Thurston counties in Nebraska; or Pottawattamie, Adair, Cass, Fremont, Mills, Montgomery, Adams, Crawford, Harrison, Monona, Page, and Shelby counties in Iowa.
 2. Be currently classified as a 501(c) 3 entity by the Internal Revenue Service, and included in IRS Publication 78, and not specifically excluded below.
 3. Have a volunteer board of directors.
 4. Have as its primary mission the delivery of health or human services to area of residents.
 5. Be governed by this United Way designation policy, which prohibits the promotion and solicitation of designations. Organizations that are not considered eligible: Cultural institutions, including churches, museums, schools (educational foundations

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are acceptable); animal welfare agencies, environmental organizations, political organizations, and government entities.

2. UWM will also honor designations from corporations which have a national corporate designation policy which is different from our own, while maintaining our current policy for all other accounts.
3. Payment of designations will follow the Standard M guidelines of United Way Worldwide. The first payment will be made by February 28th for the amount collected as of December 31st of the preceding year. Collections on pledges will be made quarterly during the year following the campaign and less frequently as cash is collected during the following year.
4. Designations will be limited only to those organizations fitting the criteria described in 3 above.

Where UWM manages a local campaign outside of the counties described earlier in this policy, the Community Impact department may waive this requirement. All of the other qualifications for designations will remain the same with the geographic criteria being applied to include the country wherein the campaign is being managed.

DONOR DESIGNATION PROCEDURES

1. A contributor must request the special card or form if he or she wishes to participate in the designation program. The designation card or form will also provide the donor the option of receiving acknowledgement from the designated agency. Persons contributing using e-pledging should follow the instructions provided.
2. Contributors making one or more designations must contribute \$50 or more per designation, unless permitted by corporations which have national corporate designation policy which is different from our own.
3. Donors are requested to provide personal and agency contact information on designations.
4. United Way will make every reasonable attempt to communicate with contributors regarding questionable designations for purpose of clarification or change in designation.
5. Donors who designate to previously unqualified non-grantees, non-grantees which decline to participate, non-grantees which lack required documentation, or non-grantees which do not meet eligibility criteria, will be notified in writing and asked to re-designate their contributions. When a donor does not respond to such an inquiry (within 14 calendar days), the contribution will be distributed through the Community Care Fund.

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6. Agencies that do not respond to a request for documentation (within 14 calendar days), which send incomplete documentation, or decline participation, will be considered invalid for the current campaign. These funds will be rolled into the Community Care Fund and the donor will be notified.
7. All checks should be made payable to United Way of the Midlands for auditing purposes.
8. Agency aggregate designations greater than \$500 will be paid in installments based on collections. Cash donations received by December 31 will be paid in February of the following year. All other payments received will be paid on a quarterly basis, ending no later the October of the following year.
9. Agency aggregate designations of less than \$500 will be distributed in their entirety in the fourth quarter, less administrative fees and a collection loss estimate.
10. All designations are subject to an administrative fee that will be deducted prior to their distribution. Collection loss will also be applied as appropriate.
11. Designated agencies will be asked to thank all donors who have requested acknowledgement. The donor's name, address and the amount of his or her gift will be provided through the UWM online portal. The donor's information will be kept confidential, and will NOT be shared with an agency unless the donor has requested an acknowledgement.
12. Promotion and/or solicitation of designations is prohibited. Agencies violating this policy may become ineligible to receive designations from this program and the contributor will be so informed.
13. A fee will be set annually to cover collection loss and administrative costs. The Finance Committee will evaluate these costs annually and a recommendation will be made to the United Way Board in order to establish appropriate fees. One-time full cash payments will be exempt from the collection loss portion of the fees.
14. Designation reports will follow the Standard M guidelines of United Way Worldwide.
15. For processing purposes, all donor designations will be recorded as requesting anonymity. This will be set as the default in the designation tracking software. Donors wishing to receive acknowledgement will make their desire known on the special cards and forms used for making designations.

For a list of programs you could choose to designate to: [click here](#)