

4. DESIGNATION POLICY

Policy Number	CI-004
Board Decision	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Not Approved
Date of Board Action	May 1, 2018
Effective Date	May 1, 2018
Officer Signature & Date	

Introduction

A designation, in relation to a donation to United Way of the Greater Chippewa Valley (UWGCV), is the act of a donor indicating specific or special distribution of said donation. Designations are received by donor advice, pledge cards, correspondence, or through third party donation and collection services (such as other United Ways, EasyMatch, EasyGive, Truist) or directly from large employers and GCL (Global Corporate Leadership). This policy on designations establishes the guideline for contributions to UWGCV that are designated by the donor to be given to a specific organization or other eligible United Way.

Additional types of designations offered on Designation Forms or Pledge Forms include:

- ***Community Fund***
United Way of the Greater Chippewa Valley's (UWGCV) allocable dollars.
- ***Targeted Initiatives***
Specific UWGCV initiatives, e.g., Successful Children's Network, Financial Stability Partnership, Community Health Initiative, etc.
- ***Geography to be Served***
County in which the donations are to be utilized as per UWGCV bylaws.
- ***Agency Omission Option***
A method that allows donors to exclude an agency, service, or program from receiving any of their gift.

Policy

UWGCV honors and processes donor designations to any United Way "Program Partner"* or other charitable 501(c)(3) organization.

Designations to United Way "Program Partner"

UWGCV adheres to a "First Dollars In" method, meaning designations to a specific Program Partner are considered first dollars toward a grant, the designation amount is included as part of, not in addition to, the approved grant amount to said Program Partner. If designations to a Program Partner exceed the approved grant amount, the total designated dollars are forwarded to the partner agency (meaning a Program Partner may receive additional dollars above the approved grant amount). Standard M** or administrative fees are not charged to designations to Program Partners.

Designations to non-“Program Partner”

Standard M or administrative fees are assessed to designations to non-program partner agencies. An agreement is in place between UWGCV and United Way of Dunn County to not charge each other administrative fees, however when applicable, an uncollectable percentage will be administered.

Donor pledge amounts and designation instructions are documented. Recipient organizations are advised of their respective designations, are supplied a list of donors, and are requested to send donor acknowledgements.

*Program Partner is an organization that receives grant funding from United Way of the Greater Chippewa Valley.

** Standard M: is one of several standards that United Way Worldwide requires local United Way's to adhere to as part of our affiliation. The overall purpose of Standard M is to assure the public that donors are charged no more than the actual cost incurred to process and transfer designated gifts. The percentages are calculated using a three-year average from the annual 990 of the organization. All United Ways use a consistent, fair and understandable methodology for calculating and recovering fundraising, processing and management and general expenses on designated donations.