

4. DESIGNATION POLICY

Policy Number	CI-004
Board Decision	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Not Approved
Date of Board Action	February 16, 2024
Effective Date	March 1, 2024

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, other United Ways, third party collection services 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., Education Initiative, Financial Stability Initiative, Health Initiative, Digital Equity 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). Administrative fees are not charged to designations to Program Partners.

Designations to non-"Program Partner"

Administrative fees are assessed utilizing standard M ** in accordance with United Way World Wide's cost deduction requirements. Designations to non-program partner agencies will be assessed an administrative fee and an uncollectable fee. With the exception of an agreement

between UWGCV and United Way of Dunn County, restricting the use of applying administrative fees, however 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 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.