



1855 East Main Street
Onalaska, WI 54650
608-796-1400
www.gruw.org

Great Rivers United Way, Inc. 2018-19 Gift & Pledge Designation Policy

Great Rivers United Way has a sophisticated, volunteer driven process for determining our community's most pressing needs and for directing gifts and pledges into those programs and initiatives that best meet those needs.

Whenever possible we encourage our benefactors to invest in our process by making gifts and pledges that apply to the full range of important programs and initiatives we fund. It is by addressing the full breadth of community needs that we improve lives and strengthen our communities most effectively. This is exactly what it means to "Live United."

In some cases however, some of our benefactors prefer to focus their philanthropy on programs that reflect their personal values and interests. Though not encouraged, Great Rivers United Way will accommodate these intentions within the confines of the following Gift & Pledge Designation Policy.

Inside Designations

Inside designated gifts and pledges to United Way's Certified Partner Agencies will be included as part of our volunteer-driven Community Investment process. These designated funds will create minimum funding levels for the Impact Areas or Certified Agencies that our benefactors select. Designations made in this manner reflect the values and interests of our benefactors *and* help ensure that our community's most pressing needs are addressed adequately. **A \$48 minimum gift or pledge is required for each Impact Area or agency designated and no more than five (5) agencies can be selected. No processing fee will be deducted from inside designations as they will be paid within the normal monthly allocation cycle.**

Inside Designations - Criteria:

1. Only designations to Impact Areas or Certified Partner Agencies will be honored.
2. There is \$48 minimum for Inside Designations (within our Community Investment process)
3. The maximum number of agency designations is 5.
4. Only positive designations will be accepted. Because negative designations cannot be honored, those pledges will be processed as though no designation was made.

Outside Designations

Great Rivers United Way will gladly process designations outside of our normal Community Investment process when gifts are designated to other United Ways or when a contributor wishes to have their gift applied in addition to, or *outside*, of the Community Investment allocation recommendation.

Pledges and gifts over \$48 can be designated to other United Ways. Pledges and gifts designated to one or more Certified Partner Agencies that are made in addition to the allocation recommendation will require a minimum gift or pledge of \$250 per agency.

All outside designated gifts and pledges will be subject to a 10% processing fee to help offset the administrative costs of tracking and distributing these special designations. In the event that a pledge or gift cannot be applied as designated, Great Rivers United Way will, at its sole discretion, designate to another Impact Area or agency that most closely matches the original request.

Outside Designations will be given directly to Partner Agencies or other United Ways, separate from Community Investment program allocations. Designations will not be program specific, and therefore not measured and evaluated through the Community Investment Process.

Outside Designations - Criteria:

1. Only designations to Certified Partner Agencies or other United Ways will be honored.
2. There is a \$250 minimum for Outside Designations to a Partner Agency.
3. There is a \$48 minimum for other United Way Designations.

4. The maximum number of agency designations is 5.
5. Only positive designations will be accepted. Because negative designations cannot be honored, those pledges will be processed as though no designation was made.

Acknowledgement:

For gifts and pledges directed to specific agencies or other United Ways, Great Rivers United Way, at your direction, will send a gift acknowledgement to the designated agencies based on your selected preference. This will allow the agencies to send thank you notes and other correspondence at their discretion. If no selection is made, your designated amount will be acknowledged to the agencies anonymously.

Payment:

Outside Designations will be paid after payment has been received by United Way. Designated payroll deduction payments will be made once the company confirms the contribution has been made by the employee. These payments will be made in August 2019 and February 2020. All cash designations will be paid in April 2019.

See www.gruw.org for a copy of the current designation policy.

(cut here and attach this form to your 2019 investment form – donor retains top portion)

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2018-19 Designation Form



I, _____ (print name), choose to designate my United Way gift for 2018-19 as directed below:

- Inside Designation (minimum donation of \$48 per agency with no processing fee)
- Outside Designation (minimum donation of \$250 per agency with a 10% processing fee)
- Another United Way (minimum donation of \$48, with a 10% processing fee)

By signing below, I hereby authorize you to:

- release my name and gift amount information to the Agency(ies) listed below (limit 5) (Provide your address below)
- release my gift amount information to the Agency(ies) listed below (name anonymous)

<u>Agency Name</u>	<u>Designation Amount</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Donor Address Info

Address: _____

City: _____

State/ZIP: _____

Total gift amount \$ _____

Total designation amount \$ _____

Signature _____

Date _____