



## **POLICIES AND GUIDELINES FOR UNITY CAMPAIGN FUNDRAISING**

United Way of Frederick County's (UWFC) Unity Campaign has a clear and vital mission to support local nonprofits who serve ALICE (Asset Limited, Income Constrained, Employed) households in need of food, shelter, clothing, financial sustainability, and healthcare as well as at-risk children and youth. To ensure a cohesive, community-centric, and fair campaign, the following policies and guidelines are in place for all participating nonprofit organizations (NPOs).

### **ALLOWABLE GIFTS AND DONATIONS**

#### **Sponsorships**

Donations offered and made as sponsorships are only accepted as Unity Campaign donations if no goods/services are received.

#### **Events**

Revenue generated from NPO-hosted events is only accepted through the Unity Campaign if the event is held during the Unity campaign period and no goods/services are exchanged. Earned revenue is not a permissible donation.

Event materials for events hosted by NPOs must state that proceeds benefit the Unity Campaign. Materials must also state that gifts are eligible for charitable deductions pursuant to the IRS code and guidelines with appropriate quid pro quo disclosures.

Revenue generated by events hosted by donors and not the NPO (i.e., where the NPO is the beneficiary and receives the net proceeds of the event) is accepted as a Unity Campaign donation.

#### **Grant Funding**

Funds in the form of a grant that align with the NPO's Unity-approved program and are received from donor-advised funds, private foundations, or other funding organizations are only accepted as a Unity Campaign donation if the NPO discloses the connection to the campaign to the funding organization. The disclosure must be on record with the campaign.

## **Gifting Timeframe**

Partner designated donations made through the Unity Campaign will be included in the Incentive Fund until the close of the campaign month. UWFC will continue to process donations through the Unity campaign for an additional 30 days. Donations made in this post-campaign 30-day timeframe will not be included in the Incentive Match. After the post-campaign 30-day timeframe, any donations made to the Unity Campaign will be treated as an individual gift and processed to the nonprofit organization according to workplace campaign guidelines.

*Ex: If the Unity Campaign runs March 12-24, donations through March 31 will be incentivized. Any donations received in the month of April will be sent through Unity Campaign distributions to the NPO but not incentivized. Any donation received in May or beyond will be treated as an individual gift and processed to the nonprofit organization according to workplace campaign guidelines.*

General/non-designated donations made through the Unity Campaign will be included in the Incentive Fund until the close of the campaign month. UWFC will continue to process donations through the Unity Campaign for an additional 30 days. Donations made in this post-campaign 30-day timeframe will not be included in the Incentive Match. After the post-campaign 30-day timeframe, undesignated donations made to the Unity Campaign will be deferred to the Incentive Fund for the following year.

## **Gift Acceptance**

UWFC will collect and process all donations. NPOs may not accept donations on behalf of the campaign. Donations must be made online or by cash, check, or through transfers of stock.

## **DONOR DATA & DISTRIBUTIONS**

### **Donor Data**

UWFC is the steward of Unity donor data and will retain this information into perpetuity, excluding credit card data, which is not retained or stored by UWFC. Only UWFC and the designated NPO receive the available donor data. Donor data is never sold or given to a third party. While primary donor data is available immediately through the peer-to-peer fundraising platform, more complete donor data will be provided promptly by UWFC to the designated NPO. Donor data for donors who wish to remain anonymous will not be shared with the designated NPO.

### **Donation Acknowledgments & Receipting**

UWFC provides appropriate acknowledgment to donors for tax purposes for their charitable contributions. NPOs may issue a separate informal "thank you" acknowledgment with no amount referenced.

## **Funding Calculations**

100% of the funds raised by the organization through the Unity Campaign are applied to the NPO's distribution. Incentive funding is solicited and is allocated based on a formula determined each year. The Incentive Fund offsets all UWFC administrative costs.

## **Funding Distributions**

NPOs receive funding within 90 days of the end of the campaign, which includes the total donations collected on behalf of the NPO, plus the NPO's share of the Incentive Fund. Although not anticipated, this window of time will enable donors to review statements so that any chargebacks (possibly due to donor error in keying in information or amounts) can be resolved.

Project Services funded through Unity Campaign fund distributions may not discriminate based on clients' gender, ethnicity, religion, age, sexual orientation, and physical or mental disabilities.

## **Runaway Rule**

To maintain fairness to all non-profit agencies participating in the Unity Campaign and to avoid any single agency from dominating the incentive fund, there will be a cap at 20% for the maximum portion that any agency can receive from the total incentive funds to be distributed.

Once 20% is reached by any agency, their incentive amount will be frozen and the remaining funds distributed to the other agencies pro-rated as standard.

## **PROMOTIONS**

### **Approved Materials**

UWFC provides a peer-to-peer fundraising platform and a toolkit (brand materials and other resources to NPOs). NPOs must get the approval of any self-generated marketing materials by the Unity Campaign prior to distribution. All purchased promotional vehicles and materials used by NPOs will be at the NPO's expense.

Event materials for events hosted by NPOs must state that proceeds benefit the Unity Campaign. Any created materials must adhere to the Unity Campaign Brand Guidelines.

## **DISCLAIMERS**

UWFC reserves the right to disqualify any NPO from participating in the event and/or receiving Incentive Fund dollars at any time before, during, or after the campaign, if, in its sole discretion, it believes that there has been a breach of these rules and/or deception on the part of the organization.

By participating in the Unity Campaign, NPOs release the UWFC, the Unity Campaign, and its

affiliates, officers, board, and employees, jointly and severally, from any claims for any loss or damage sustained while participating in the Unity Campaign.

UWFC can modify any restrictions or conditions if, in the sole judgment of the Board of Directors, such restriction or condition becomes unnecessary, incapable of fulfillment, or inconsistent with charitable needs of the community.

UWFC makes no warranties or representations as to the success of the Unity Campaign or of any individual participant and in no way, directly or indirectly, guarantees any results or the number/amount of donations. To ensure compliance with these policies, and if you are considering a new activity or method to secure monies for the Unity Campaign, please contact UWFC at 301.663.4231 to discuss.

### **ROLES FOR UNITY CAMPAIGN ADMINISTRATION**

#### ***The United Way of Frederick County (UWFC) will:***

- Fund, create, maintain, and oversee the MobileCause online giving platform
- Manage and oversee all administrative aspects of the campaign
- Serve as a liaison between the NPO and MobileCause
- Seek sponsors and donors for the Incentive Fund
- Create a common message and brand for the campaign, providing easy to use and access templates
- Provide training and resources to prepare for the campaign
- Offer on-going support to the NPOs throughout the campaign
- Act as the primary media contact to grow interest in and exposure of the campaign
- Utilize the UWFC platforms to increase campaign and NPO awareness
- Protect donor intent and anonymity (as requested) throughout the campaign
- Receipt donors for tax-deduction purposes

#### ***The Participating NPOs will:***

- Thoughtfully and strategically complete the Unity application to provide complete information for review and the creation of the MobileCause giving pages
- Use the resources provided by UWFC to strengthen your campaign
- Share the campaign's message using the NPOs established communication channels
- Utilize the campaign's logo, wordmark, and message consistent with brand guidelines
- Contribute to outreach events as necessary/requested
- Work to steward contributing donors throughout and after the campaign