



United Way  
of the Eastern Panhandle, Inc.

## **United Way of the Eastern Panhandle 2024 FUNDRAISING POLICIES AND GUIDELINES FOR UNITY CAMPAIGN**

The United Way of the Eastern Panhandle's (UWEP) Unity Campaign has a clear and vital mission to support programs of local nonprofits that align with UWEP's impact areas of education, financial stability, health and basic needs in the WV counties of Berkeley, Morgan and Jefferson. 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 (Year). Materials must also state that gifts are eligible for charitable deductions pursuant to the IRS code and guidelines with appropriate quid pro quo disclosures. Materials must be pre-approved by UWEP staff.

Revenue generated by events hosted by donors and not the NPO (i.e., where the NPO is the beneficiary to receive the net proceeds of the event) can be 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 disclosed 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 campaign until the close of the campaign on March 15, 2024. Participating agencies will have five days to deliver any outstanding contributions to the UWEP office. Funds delivered by March 20 will be incentivized. There is not to be any solicitation for funds during that five-day window, and the GiveSmart platform will not be available for donations after March 15.



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Following March 20<sup>th</sup>, United Way will continue to process donations through the Unity Campaign for an additional 9 days. Donations made in this post-campaign 9-day timeframe will not be included in the incentive match unless the donation is received by mail and is postmarked by March 15, 2024.

After the post-campaign 9-day timeframe, any donations made to the Unity Campaign will be deferred to UWEP's regular workplace campaign (and will subsequently follow the policies and distribution dates of the workplace campaign and fiscal year).

Ex: If the Unity Campaign runs March 1-15, donations through March 20 will be included and incentivized. Any donations received between March 21-29 will be included in Unity Campaign distributions to the NPO but not incentivized. Any donation received after March 29<sup>th</sup> will be included in the UWEP community campaign and will follow those policies and procedures.

General/non-designated donations made through the Unity Campaign will be included until March 29, 2024 and will be equally distributed to all participating organizations.

### **Gift Acceptance**

United Way of the Eastern Panhandle 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. **Checks must be made payable to United Way of the Eastern Panhandle, not the participating NPO.**

## **DONOR DATA & DISTRIBUTIONS**

### **Donor Data**

UWEP 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 UWEP. Only UWEP 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. Donor data for donors who wish to remain anonymous will not be shared with the designated NPO.

### **Donation Acknowledgments & Receipting**

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



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## Funding Calculations

100% of the funds raised by the organization through the Unity Campaign are applied to the NPO's distribution. Incentive funding is available and is allocated based on a formula determined each year. UWEP raises funds to offset administrative costs of the Unity Campaign.

## Funding Distributions

NPOs receive funding in July of the campaign year, 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.

## PROMOTIONS

### Approved Materials

UWEP 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 for the Unity Campaign by UWEP staff prior to distribution.** All purchased promotional vehicles and materials used by NPOs, outside of what is provided by UWEP, will be at the NPO's expense and **must be pre-approved before use.**

Event materials for events hosted by NPOs must state that proceeds benefit the Unity Campaign (Year). Any created materials must adhere to the Unity Campaign Brand Guidelines and be **pre-approved.**

## DISCLAIMERS

UWEP 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 United Way of the Eastern Panhandle, 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.



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UWEP 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.

UWEP 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 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 UWEP at 304-263-0603 to discuss.**

## **ROLES FOR UNITY CAMPAIGN ADMINISTRATION**

The United Way of the Eastern Panhandle (UWEP) will:

- Fund, create, maintain, and oversee the GiveSmart online giving platform
- Manage and oversee all administrative aspects of the campaign
- Serve as a liaison between the NPO and GiveSmart
- Seek sponsors and donors for the incentive fund
- Create a common message and brand for the campaign, providing easy-to-use and access to templates
- Provide training and resources to prepare for the campaign
- Office on-going support to the NPOs throughout the campaign
- Act as the primary media contact of the campaign
- Utilize the UWEP 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 GiveSmart giving pages
- Use the resources provided by UWEP 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
- Attend mandatory training prior to campaign.
- Complete and submit report form (if requested) by December 31, 2024.