

United Way for Greater Austin Designation Policy

The following information applies only to gifts processed by United Way for Greater Austin ("United Way ATX"), in the amount less than \$10,000. United Way ATX has the discretion, with the approval of the CEO, to make exceptions to this policy.

We understand some donors may wish to designate their gift to a specific agency or nonprofit, outside of our partner agencies. Although we process these donor-directed contributions as a service to our donors, United Way ATX is unable to guarantee how designated funds to a non-partner agency will be used or ensure measurable results.

MAKING A DESIGNATED GIFT

- A minimum of \$250 contribution is required when designated to a ***non-partner*** agency.
- United Way ATX will only process designations for a maximum of one ***non-partner*** agency for each donor.
- A processing fee will be deducted from the amount paid to the ***non-partner*** agency. This fee is to be deducted at a rate not to exceed a three-year average calculated from the most recently filed 990 tax form. This fee will never be more than 20% and will be capped at a maximum of \$250.
- Agencies must be 501(c)(3), tax-deductible organizations and must comply with the United States Patriot Act by submitting proper documentation to United Way ATX.
- Donors and/or employers acting on their behalf are responsible for providing complete and accurate agency information (name, address, city, state, and EIN) at the time of pledge.
- Designated gifts that do not meet the criteria above will remain with United Way ATX to make the greatest impact in our community.
- All corporate matching dollars made on designated gifts will remain with United Way ATX.

AGENCY PAYMENTS & ACKNOWLEDGEMENTS

- Designated gifts are distributed after payment is received.
- Gifts received are paid to agencies quarterly.
- Designated gifts made to our partner agencies fulfill existing program funding commitments made by United Way ATX. Any designated gifts received in excess of existing commitments are sent in addition to United Way ATX funding.
- Donor names and gift details are available to designated agencies unless the donor chooses to remain anonymous, or if an employer does not promptly provide United Way ATX with detailed donor gift information.

FUNDRAISING & ADMINISTRATIVE COSTS

United Way ATX keeps Administrative and Fundraising Overhead as low as possible and in line with nonprofit best practices as recommended by the BBB Wise Giving Alliance, Charity Navigator and Guidestar.

Effective date: 07/01/19

Last Update: 6/26/24

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