

## Callaway County United Way Annual Campaign Designation/Restricted Gift Policy Summary

- 1) A donor may restrict to one or more of the following:
  - Any United Way other than the Callaway County United Way
  - Any specific not-for-profit charitable organization
- 2) A minimum \$25 per restricted gift is required for a donor to restrict his/her charitable gift. In order to keep costs as low as possible for our donors, a gift of \$24 or less will be treated as a gift to Callaway County United Way.
- 3) Employees and other individuals are eligible to designate/restrict their individual gifts.
- 4) According to recent standards established by hundreds of national and regional employers, pledge processors, and United Way of America, a service fee equal to 10% of the designated gift amount will be applied up to a maximum of \$150 per donor per year. This fee complies with all of the new nation-wide standards.
- 5) Designated/Restricted gifts can only be paid out if contributions are received. Because of normal employee turnover, most organization's employee total pledges are not paid in full. As a result, the Callaway County United Way must use an uncollectible rate to balance all the payments received from all employers for a specific restricted charity. Each employer's actual rate of collections is used when sending the funds to the restricted charity. United Way will send 100% of the actual funds received, less the service fee, to the restricted charity.
- 6) Payouts to designated charities are made annually.
- 7) All restricted gifts are paid directly to the charity, separately and regardless of the charity's funding from this or any other funding source or United Way organization.

