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### DONOR CHOICE POLICY

The Community Fund is the money that goes directly to Northumberland United Way (NUW) funded programs and partners. Benefits of giving to the Community Fund include:

- a) a Community Review Process directs funds where services are most needed;
- b) a broad range of services are funded;
- c) fundraising is cost effective;
- d) one gift supports a variety of services; and
- e) the donor is assured of the integrity of the organizations supported and reviewed.

At the same time, NUW recognizes that the ability to generate funds for the Community Fund is directly dependent on the ability to respond to the needs of donors. Donors want the option to make choices and exercise control over the purchase/investment/donation decisions. This is the reason that NUW offers choice to donors.

NUW promotes the value of donors entrusting gifts to the Community Fund, allowing volunteers and professional staff using the allocation process to determine where donations will have the most impact. Based on this, NUW:

- a) promotes the option of donors directing funds to the Community Fund;
- b) offers options for donors to direct all or part of the donations to NUW funded community partners and to United Ways anywhere in Canada; and
- c) accepts gifts where donors choose to direct all or part of the donations to any other registered Canadian charity providing human and health services.

Designations to any registered Canadian charity will be accepted as a service to individual donors. NUW will not actively solicit designations to any registered Canadian charities from corporations or foundations.



## Procedure Regarding Designations

1. Designations to another United Way, a specific NUW funded partner or a specific registered Canadian charity shall be a minimum of \$75.00. In order to equitably recoup administrative and fundraising costs, organizations receiving designations will be assessed an administrative fee of 15% from each donation (cash, cheque, credit card, or pledge) with a maximum of \$500 per designation. The actual percentage of pledge loss will also be retained by NUW from designations through payroll pledges. There will be no administration fee charged for designations to other United Ways.
2. Designation payments to other organizations received through credit cards or on-line donations will be based on actual dollars received by NUW, net of any credit card or on-line fees, less the administration fee of 15% to a maximum of \$500.
3. Requests to exclude a specific agency from receiving funding (i.e. negative designations) will not be honoured.
4. Any designations to NUW's funded community partners are treated as first dollars in. Total donor designations that exceed the allocated amount to a funded community partner will be paid to them as such designations are received by NUW.
5. Funds designated to a specific organization which NUW cannot distribute because the organization is not a registered Canadian charity, or because the charity name is not legible on the pledge card, will be directed to the Community Fund.
6. Cash, cheque, Visa, MasterCard, and Amex designations received during the campaign year will be forwarded to the organization prior to year-end. Designations received through payroll deductions will be forwarded annually following payment of the pledge, prior to year-end when payment is completed, and will be based on the dollars received, net of any pledge loss.
7. In keeping with NUW's Privacy Policy regarding confidentiality of donors, the list of donors designating gifts will be kept confidential unless requested by the donor to provide the information. Organizations will be advised of amounts designated and NUW will thank and receipt donors.