



**CHANGE  
WON'T HAPPEN  
WITHOUT YOU**

## Individual Donor Directed Contribution Program

Donor Name \_\_\_\_\_

Home Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Employer \_\_\_\_\_

Please indicate method of giving:  Payroll Deduction  Cash \$ \_\_\_\_\_  Check # \_\_\_\_\_

### PLEASE DIRECT MY DONATION TO A SPECIFIC NOT-FOR-PROFIT ORGANIZATION

Designated gifts to specific 501(c)(3) agencies are not reviewed or held accountable for results by United Way. Donor designated gifts will be assessed a processing fee for administration and management costs associated with that designation. We process these gifts as a service to our donors.

Agency \_\_\_\_\_

Amount \$ \_\_\_\_\_ (Minimum \$50 Contribution Per Designation)

Agency Address \_\_\_\_\_

City, ST, Zip \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

*(Required to process designation)*

Please do not release my name with this donation.

\* Donor may be required to substantiate eligibility of selected agency, including 501(c)(3) tax determination letter, counter-terrorism compliance, and listing of agency on IRS's Charitable Organization website at [www.irs.gov](http://www.irs.gov). Any designation to a non-qualifying organization will be directed to the Community Impact Fund. Donor designations are distributed to agencies only, not to programs.

GIVE. ADVOCATE. VOLUNTEER.

United Way of Wapello County  
[Wapellocouw.org](http://Wapellocouw.org)



**RETURN BY DECEMBER 31, 2014**

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## **United Way of Wapello County Individual Donor Directed Contribution Program**

United Way of Wapello County's mission is to improve lives by uniting the caring power of our community. Its goal is to advance the common good in Wapello County by focusing on the three building blocks for a good life: education, income and health. United Way's fund raising strategies, including its annual workplace and public campaign, provide monetary resources to support its mission and goals. United Way is aware that some donors choose to direct their contributions. United Way's pledge form provides the option for individual donors to direct part or all of their pledge to a specific health and human services agency or agencies, and multiple donor directed contributions are allowed. In the event an individual's employer does not use United Way's pledge form, a separate Donor-Directed Contribution Form is available upon request from United Way. Only personal contributions from individual donors may be directed, and an employer match, if available, does not follow donor-directed contributions. Negative designations are not honored.

**Agency Eligibility** – Participating organizations must meet and adhere to the following guidelines to qualify for designations:

- (1) The organization is a 501(c)(3) tax-exempted charitable non-profit organization as determined by the IRS.
- (2) The organization provides or promotes health or human services. The Donor-Directed Contribution Program is not available to political or religious causes, educational institutions, recreational, scientific, animal welfare or cultural operations, missions and/or goals. If the charitable function of an organization is unclear or in dispute, the Internal Revenue Service "Activity Code" will be used to determine agency eligibility as a provider or promoter of health and human services.
- (3) The organization must have a presence within the state of Iowa and serve people within the state of Iowa. An Iowa-based Post Office box or "800" phone number does not constitute State of Iowa presence.
- (4) United Way of Wapello County must have a completed Donor-Directed Contribution Program Application from a participating agency.
- (5) United Way of Wapello County will ask participating agencies to submit a completed Donor-Directed Contribution Program Application at least every five years in order to determine ongoing eligibility to receive donor-directed contributions.
- (6) All 501 (c)(3) donor-directed contribution participants must annually sign a form indicating compliance with the U.S. Patriot Act and all other anti-terrorism laws.

### **Program Administrative Activities**

United Way administers all donor-directed activities: agency-eligibility screening, pledge processing, contribution fulfillment, income tax receipting, and distributions. United Way's administrative fee for these services is 22% for 2014. Distributions of donor-directed contributions follow a quarterly schedule beginning in the spring of 2015 following the completion of Campaign 2014. Distributions reflect payments received from donors at the time of each scheduled distribution; however, the amount a 501(c)(3) non-profit receives is reduced for non-collection from donors (5% in 2014) and by the administrative fee discussed above. If total designations to an 501(c)(3) non-profit are under \$1000, all designations will be paid in the 4th distribution period. United Way will provide each 501(c)(3) non-profit receiving donor-directed contributions with a complete listing of donor names, addresses and designation amounts if the donor has waived anonymity. United Way will issue donor tax receipts required for IRS charitable deduction compliance, regardless of whether a donor designates all or part of his/her pledge through the donor-directed contribution program.

### **Provision for Collection Loss**

Payments are based on actual collections by company, the estimated collection loss is 5% based on campaign history.

### **Standard Administrative Fee.**

The fees assessed by United Way of Wapello County for the 2014 Campaign Year are calculated from our prior 3-year IRS Form 990 returns as follows:

Fundraising & Management and General Costs:	22.00%
Provision for Collection Loss:	5.00%
Total Processing Fee:	27.00%