

# United Way of Santa Barbara County

## Annual Campaign Giving Policies

2006 - 2007

1. United Way of Santa Barbara County's (UWSBC) local all volunteer board of directors encourage all individual and employee donors to give directly to UWSBC's ***Power of Partnership Agenda*** to insure their giving investments produce meaningful impact right here, right now in our community. Donors investing in UWSBC's ***Power of Partnership Agenda*** join with an increasing number of like-minded local community investors and leaders multiplying their giving, enjoying the highest possible accountability for both dollars and results while receiving appropriate recognition for their efforts.
2. The ***Power of Partnership Agenda*** includes:
  - o **UWSBC Special Initiatives and Collaborations**
  - o **High Impact focus areas for Children, Families and Seniors**
  - o **UWSBC Community Care Fund**
3. Individual and employee donors, for very personal reasons, may choose to designate/restrict their gifts to the following:
  - o Geographic areas in Santa Barbara County and the United States
  - o Specific Internal Revenue Service designated 501 c 3 human service agencies
4. When an individual or an employee donor chooses to designate/restrict his or her gift through UWSBC the following principles are followed to insure fair and efficient managing of each donors designated/restricted contribution. The principles are as follows:
  - o Designated/restricted gifts be paid totally separate from other contracts or funding arrangements when the agency is receiving funding from UWSBC within the ***Power of Partnership Agenda*** process.
  - o All of the actual funds received less service fees will be paid in an efficient and timely manner to each designated/restricted area or charity.
  - o A minimum gift amount be established, each year, based on through business analysis to insure each donation is cost-effectively managed. Gifts of lesser amounts are to be credited to the UWSBC Community Care Fund.
  - o Designated/restricted giving service fees must be consistent with other United Ways.
  - o When the gift is a payroll deduction pledge the amount of the pledged gift must be adjusted to insure the actual funds received by UWSBC are paid to their designated/restricted area or charity in a reasonable period of time and in a cost-effective manner.
5. This year to make a designated/restricted gift process is as follows:
  - o Obtain a designated/restricted gift form from your SBCUW representative; a new completed form is required each year to insure proper credit.
  - o This year's minimum gift level, to insure efficiency, is \$100. If your restricted gift per charity is less than \$100 it will be credited to the UWSBC Community Care Fund.
  - o We will follow the nation-wide standard service fee this year as established by United Way of America for all United Ways is 13.3% to a maximum of \$250 per donor.
6. Each year, normal employment turnover among most Santa Barbara County employers means not all of the employee pledges are fully paid. Each employer's actual rate of collection for their employee group is used to determine the actual funds received by SBCUW when sending funds to a designated/restricted area or charity. UWSBC then sends all of the actual funds received less the United Way of America nation-wide standard service fee, to the designated/restricted area or charity.
7. Payments to designated/restricted agencies or areas are described in detail as part of the Pledge and Designation Process Timeline on the reverse side of this document. For efficient use of United Way resources, payment checks are issued on a regular basis throughout the year when the amount to the charity is \$75 or more. If the payment amount to the restricted charity never reaches \$75, then all restricted gifts will be paid out with the final campaign designation payment.
8. All designated/restricted gifts are paid directly to the area or charity in a manner separate from any other funding received from UWSBC or other funding organization.