



United Way of
Portage County

UNITED WAY OF PORTAGE COUNTY SUPPLEMENTAL FUND RAISING POLICY

Philosophy

The United Way and the member agencies are partners in meeting the human service needs of the people of Portage County. Recognizing that the needs will always be greater than the resources of any one organization, the United Way encourages all member agencies to develop alternative sources of revenue and pledges to work with member agencies in their efforts to enlist the financial support of the community. In turn, the cooperation of the member agencies is necessary to preserve and protect the image, integrity, and financial security of the United Way. The unique partnership of the United Way and its member agencies can only be sustained and enhanced through cooperation and understanding.

Policy

The following policy provides the framework within which member agencies may engage in supplemental fund raising activities. Member agencies are encouraged to consult with the United Way at any time about any aspect of the following policy.

A. ALLOWABLE ACTIVITIES BEFORE AND AFTER BLACKOUT PERIOD

The following activities are allowed at any time **except between September 13 and November 14, 2009.**

1. Annual membership mail campaigns to *participating* and *sustaining* members as defined below.

Participating members - those affiliated with the agency primarily to use its services or to actively serve and/or promote its aims.

Sustaining members - those affiliated with the agency primarily to financially support its aims without expecting to use its services or participate in its activities. Such members are limited to present and former board and agency committee members, present and former participating members and their immediate families, agency volunteers, and other persons with direct ties to the agency.

2. Special events, concerts, raffles, and other activities conducted on a value-received basis. Publicity and materials promoting the activity must identify the agency as a member of the United Way; and in conducting such activities, the agency may not:
 - a) Endorse products or services of particular companies or firms.
 - b) Contract with private, profit-making organizations which require a share of the profits.
3. Solicitation of businesses/corporations who have not contributed to the most recent United Way campaign. (The United Way will provide member agencies, upon request, a list of those businesses/corporations that have contributed.) Agencies may only solicit businesses/corporations not on the list. Individual employees may not be solicited.
4. Active, electronic solicitation through agency website.
5. Solicitation of civic, religious, and fraternal organizations.
6. Requests for discounts on merchandise or merchandise donations are permitted.

B. ALLOWABLE ACTIVITIES ANY TIME OF THE YEAR

1. Requests for grants from non-corporate foundations and trusts. (United Way will provide, upon request, a list of corporate foundations which choose to provide corporate support through the United Way and may not be contacted separately by member agencies.)
2. "Donate now" buttons on agency website. These may remain active throughout the year, as long as the agency does not actively campaign and solicit donors or prospective donors during United Way's blackout period.
3. Presentations to civic, religious and fraternal organizations are allowed at any time of the year. However, agencies are not permitted to solicit these groups during United Way's Blackout Period.

C. UNALLOWABLE ACTIVITIES

The following fundraising activities are not allowed. Exceptions may be warranted under certain conditions but must be approved by the United Way through a pre-approval process.

1. Direct mail, telemarketing, canister, or fund raising media campaigns beyond the agency's **participating** and **sustaining** membership.

2. Solicitation of funds from businesses, firms, corporations, and corporate foundations that have contributed to the most recent United Way campaign.

C. NONCOMPLIANCE

It is important that the United Way and its member agencies comply with the spirit and intent of this policy. In instances where member agencies do not comply, the policy will be enforced in the following manner:

1. First Violation - the agency executive director and board president will be required to meet with United Way to discuss the violation.
2. Second Violation - the agency will be required to provide the United Way with complete documentation of what funds were raised and how. United Way reserves the right to deduct an appropriate amount from the agency's allocation.
3. Third Violation - the agency will be subject to termination of its United Way membership status.

United Way's executive committee will manage all issues and decisions related to non-compliance of the principles of participation & the supplemental fundraising policies.

All violations of this policy will be managed by the Executive Committee. An agency representative will appear before the Executive Committee, which will make a recommendation to the Board of Directors, which may include cessation of funding. The Board of Directors will make a final decision based on the recommendation of the Executive Committee. The agency may appeal the board action at the following board meeting.

UNITED WAY AGENCY STATUS

If an agency loses its United Way funding, it is no longer a member agency. The agency must re-apply as a new agency in order to regain member status.