

**United Way of South Mississippi**  
**Donor Designation Policy**  
**Board Reviewed 10/2024**

**Purpose:** United Way of South Mississippi (UWSM) processes designated contributions (aka donor-directed funds) as a service to its donors. This policy strives to balance the wishes of donors for the distribution of their charitable giving and the needs of the overall community.

1. To receive designations an agency must have a federal tax exempt status of 501(c) 3, provide Health and/or Human Service programs and be currently in compliance with the IRS standards as verified by Candid. In addition, agencies must comply with the US Patriot Act and the US Freedom Act. Designations to an agency other than a Health and/or Human Service program will not be honored and will be placed in the UWSM CI fund.
2. Although UWSM processes designations as a service to its donors, UWSM is unable to guarantee how designated funds to a specific agency will be used or ensure measurable results by the recipient agency.
3. Agencies identified as hate groups by the Southern Poverty Law Center (as verified by Candid) are not eligible to receive designations from UWSM.
4. Agencies must serve citizens of Hancock, Harrison, Pearl River, Jackson, George, and/or Stone counties or the parishes served by the United Way of Southeast Louisiana, to meet United Way's mission to serve the local community. Donor designations to other US United Ways will also be accepted.
5. UWSM has set a minimum designation amount of \$500 (\$9.62 per week). Amounts below that will not be recognized.
6. UWSM will honor designations for up to 12 months. The donor must complete a new pledge form each year.
7. UWSM will accept a designation to one agency per pledged donation. If additional agencies are listed, only the first one will receive funding.
8. UWSM requests corporate gifts and Tocqueville gifts be made to the Community Impact Fund.
9. Designations may not be made back to the agency running the campaign.
10. Designations to national nonprofits (i.e. American Heart Association, American Red Cross, and American Cancer Association) will be sent to the local chapter of that organization unless otherwise specified.
11. Designation payments are paid semi-annually in June and December and are based upon actual collections.
12. United Way Worldwide has developed uniform standards for the maximum amount to be deducted from donor pledges (Standard M). UWSM operates in full compliance with Standard M. UWSM will deduct fundraising costs from designations paid to agencies. UWSM will deduct management and general costs and fundraising costs from designations paid to other US United Ways.

13. UWSM will provide each eligible organization that receives donor-directed contributions with an available list of donor names, addresses, designation amounts, etc. to be in compliance with Standard M unless the donor has requested anonymity. Please note, not all employers share donor-directed contribution information with UWSM.
14. Designations are handled as a separate funding stream for agencies, which receive donor designated dollars in addition to their allocations from the Community Impact Fund, if applicable.
15. UWSM will not promote designations.
16. UWSM honors a donor's choice to designate to a specific charity. Gifts to UWSM partner agencies are treated as the "first dollars" toward that agency's annual grant allocation. UWSM supplements these dollars with funds given directly to UWSM to complete the agency's total annual allocation. In the event that the total of these designated gifts exceed a particular agency's annual allocation, the agency will receive the larger amount.