

CALLAWAY COUNTY UNITED WAY
AGENCY REQUEST FOR SUPPLEMENTAL FUND-RAISING ACTIVITY

Directions: This form must be submitted 30 days prior to beginning the activity. Please review and follow the guidelines in the Self-Support Policy.

Agency Name: _____ Date: _____

Submitted by: _____

Position: _____

- 1. Type of Activity:
 - a. Sustaining/Family Membership Enrollment: _____
 - b. Capital Campaign _____
 - c. Special Event _____
 - d. Other (specify) _____

2. General description of activity:

3. Amount to be raised: \$ _____

4. Estimated cost of activity: \$ _____

5. Date of activity: from _____ to _____

6. What will the funds be used for?

7. What method of contact will be used?

8. How will the list of prospects be developed?

9. Are there any major changes from past years in the method used? (If yes, please explain.)

10. How many solicitors will be used and how will they be recruited?

SELF-SUPPORT POLICY

The United Way campaign is a combined community solicitation on behalf of partner agencies to support human service programs in Callaway County. The community responds best to a united annual appeal, because it knows that funds are used for vital programs and the cost to solicit funds will be minimized.

At the same time, the needs of partner agencies exceed the support available through the United Way. The United Way encourages partner agencies to seek other revenues so long as the effort does not conflict with the combined effort of the United Way.

Therefore, the following policy and guidelines have been established to clarify each agency's commitment to ensure an effective campaign effort. The policy applies to funds raised for ANY and all aspects of an agency's operation, even if United Way funds are used for only one aspect of a particular agency.

A. Notification of Fundraising Activities by Member Agencies:

To ensure that Agency plans are consistent with this policy, the Agency shall submit an annual list of planned fundraising activities with their Request for Funding application each year. (Page 3 #14) For additional fundraising activities planned during the year, a Supplemental Fundraising Activity Form (Form S-1) will be submitted as soon as a date is set for an upcoming event, but not less than thirty (30) days prior to the beginning of the event. Grant writing is exempt from this policy. The Callaway County United Way Board will approve routine requests. The United Way Board will approve or reject a request within 15 days of the submitted request.

1. Any request denied by the United Way can be appealed by submitting a letter to the President of the Board of Directors.

B. Prohibited Fundraising Activities for Callaway County United Way Member Agencies:

1. Fund Raising of any kind from October 1 through December 31. This is known as the "Blackout Period." Direct mail letters are not to be sent out after September 15, as this would essentially be requesting a response after October 1.
2. Corporate Solicitation with the exception stated below (C5.)
3. General Public solicitation.

C. Fundraising Activities Permitted Only Outside of the Blackout Period, which is held from October 1 through December 31 (see above):

1. Sustaining membership among friends of the Agency. Such efforts may be directed only to individuals who have shown an interest in the Agency (not the general public.) All printed materials used to develop the membership shall clearly show that the organization is a partner of the Callaway County United Way.
2. Seasonal Appeals
3. Disaster Appeals (may possibly be permitted during the Blackout period, with prior permission.)
4. Special Events
5. Corporate Solicitation

- a. Agencies are permitted to solicit a cash donation from any corporation, which has **not** given a cash donation to the United Way during the most recent campaign. Agencies must request the list of current year contributors from the United Way and cannot solicit them. This list will be updated each January.
- b. Agencies are permitted to solicit non-cash donations from all corporations.

D. Permitted Fundraising Activities Throughout the Year:

1. Grant writing (public and private.)
2. Benefits where the amount charged is the approximated value that would normally be charged for such an event.
3. Sale of goods and/or services reasonably close to retail value.

E. Capital Campaigns

A Capital campaign is defined as an organized solicitation to raise over \$10,000 for the purpose of replacing, expanding, or improving current facilities (this includes equipment.)

It is not the intent of the United Way to place restrictions on necessary Capital Campaigns. United Way approval of all such projects is required to insure that multiple Capital Campaigns are not conducted at the same time (for obvious detrimental reasons) and because Capital Campaigns cannot be held at the expense of the annual United Way campaign.

The Agency shall notify the United Way of the possibility of a Capital Campaign as soon as possible during the planning stages. Once a plan has been formulated, the Agency shall request, in writing, approval from the United Way. The following information will be required:

1. Documented need for the campaign
2. Alternatives considered
3. Preliminary site plans, cost estimates, etc.
4. Campaign details (timetable, scope, volunteers, publicity, methodology, etc.)

The Agency may be invited to a United Way Board meeting to discuss the project. The Board will notify the Agency of its findings in a timely manner.

F. Summary:

In matters relating to fund raising activities, the responsibility of Member Agencies is to abide by the provisions of this policy statement and the conditional approval of a request to solicit. All results of any fundraising activity shall be reported on the Request for Funding forms