

## United Way of Taylor County Fundraising Guidelines

These guidelines have been created to ensure the most successful United Way campaign possible to the benefit of all partner agencies, businesses, other donors, and the community.

United Way fundraising guidelines are established to enable United Way to:

- Conduct a successful campaign on behalf of the community and partner agencies receiving funds through United Way.
- Maintain and foster a mutually responsive and supportive relationship with agencies funded through United Way.
- To allow United Way of Taylor County and partner agencies to comply with multiple public and private sector requirements and rules.
- Enable partner agencies to conduct supplemental fund development activities which maintain the high ethical standards of both United Way and the partner agencies.

### SPECIFIC GUIDELINES

1. United Way partner agencies may not conduct workplace solicitation at any time of the year.
2. Partner agencies may conduct special events any time of the year, but solicitation of these sponsorship or donations to this event may not be made during the closed period (January 1<sup>st</sup> – March 1<sup>st</sup>).
3. Partner agencies may solicit businesses and individuals for in-kind donations at any time.
4. Fundraising events for partner agencies may not take place between January 1<sup>st</sup> and March 1<sup>st</sup> United Way's closed period. Follow-up on previous contracts should not be conducted during this time either.

### CLOSED PERIOD

January 1 – March 1 is considered the "closed period" and United Way partner agencies may not conduct any fundraising events during this time. This includes any and all solicitation of individuals, businesses, or corporations; newsletters with direct requests, and sending solicitation envelopes in newsletters.

### EXEMPTION

Partner agencies may request an exemption from the fundraising blackout period. Exemptions will only be considered under the following conditions:

1. The agency must complete and submit an Exemption Request Form, available from United Way of Taylor County.
2. The request must clearly outline the purpose of the fundraising activity, its scope, and intended impact.
3. All exemption requests are subject to review and must be formally approved by the United Way of Taylor County Board of Directors prior to any fundraising activity taking place.

Failure to obtain prior approval may result in noncompliance with United Way partnership expectations.

### OTHER

1. Soliciting contributions in response to crisis situations – please call United Way.
2. Partner agencies may conduct approved product sales any time of year, e.g. Girl Scout cookies, Boy Scout popcorn, etc.
3. No agency will distribute correspondence, newsletters, brochures or other literature which actively encourages people to designate a United Way contribution to your agency or conduct an organized effort to have individuals encourage their fellow employees to designate to a particular agency.

The above actions may eliminate any partner agency from receiving United Way funding.