

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 entire community.

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

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

Dane County businesses and corporations are made aware of the guidelines annually and are encouraged to:

- 1) Communicate their support of these guidelines to agencies, and
- 2) Refer activities which they determine are improper or inconsistent with these practices to United Way of Dane County.

For the exceptional cases where violation of the guidelines occurs, the situation will be reviewed first by the Community Impact Department and if necessary the United Way Board of Directors.

SPECIFIC GUIDELINES

Workplace

- 1. Agencies may not approach business/corporations at any time for operating or program support. This includes corporate foundations and trusts.**
- 2. United Way partner agencies may not conduct workplace solicitation at any time of year.**
- 3. Partner agencies may conduct special events any time of year. Solicitation of sponsorship of these special events may not be made during the closed period.**
- 4. Partner agencies may solicit businesses and individuals for in-kind donations at any time.**

Closed Period

- 5. The time between August 15 and November 1 is considered the “closed period” and United Way partner agencies may not conduct any fundraising during this time. This includes any and all solicitation of individuals, newsletters with direct asks, including sending solicitation envelopes in newsletters.**

Capital Campaigns

- 6. Capital campaign fundraising should be conducted within the timeframe established by the Capital Fundraising Committee (CFC) including suspending activities between Aug. 15 and Nov 1, United Way’s closed period. Follow up on previous contacts should not be conducted during this time. Please contact United Way prior to August 15 if this is not the case.**

Other

- 7. Soliciting contributions in response to crises situations—please call United Way.**
- 8. Partner agencies may conduct approved product sales any time of year, e.g. Girl Scout cookies, Habitat Restore, Porchlight Products, Goodman Community Center’s Ironworks Cafe.**
- 9. No agency will distribute correspondence, newsletters, brochures or other literature, which actively encourages people to designate a United Way contribution to a particular agency or conduct an organized effort to have individuals encourage their fellow employees to designate a particular agency.**

The above actions may eliminate an organization from receiving United Way funds.