

**United Way of Greater Rochester
Donor Designation Eligible Agency Application**

Agency Legal Name:

DBA/Common Name for Publication Purposes:

Employer Identification Number:

Agency Mailing Address:

Telephone:

Web site:

Contact Person's Name:

Contact Person's Title:

Contact Phone Number:

Contact E-mail:

Agency Description: (Firm 25 word maximum for publication purposes):

Please verify compliance with United Way policies by checking each box, attaching required documents, and signing below:

1. I certify that the agency's primary purpose is providing direct health or human services within Genesee, Livingston, Monroe, Ontario, Wayne, and/or Wyoming County (the "Greater Rochester Area") to Greater Rochester Area residents;

OR

I certify that the agency is an arts organization/museum offering educational programming for school age youth/students residing within the six-county "Greater Rochester Area".

2. I certify that the agency provides health or human services and is not an organization that addresses religion, library services, environmental services, animal services, or federated fundraising

3. I certify that the agency is tax-exempt under section 501(c)(3) of the Internal Revenue Code ("Code") and not a private foundation under Code Section 509(a) or that the agency is a volunteer fire department, a volunteer ambulance corps or a war veteran organization meeting IRS guidelines for receiving charitable donations. **Include as Attachment A a copy of the agency's most recent IRS determination letter.** *Volunteer fire, ambulance and veteran organizations without 501(c)(3) exemption letters must include as Attachment A, a copy of the organization's Certificate of Incorporation (as amended) or enabling statute to verify non-profit status and a copy of the organization's by-laws.*

4. I certify that the agency is current in meeting federal filing requirements. **Include as Attachment B a copy of the agency's most recently submitted IRS Form 990 or 990-EZ; confirmation of filing IRS Form 990-N; or explanation of why the organization is exempt from filing an annual Form 990 with the IRS.**

5. I certify that the agency will use any funds designated to it through United Way for charitable purposes only

6. I certify that the agency is registered with the Charities Bureau of the New York State Attorney General and that it is current with all required filing. **OR** I certify that the agency is exempt from registration. **Include as Attachment C a copy of the agency's most recent CHAR500 filing (if registered) or, if exempt, include the reason the agency is exempt.**

7. I certify that the agency is governed by a Board of Directors. **Include as Attachment D a list of Board members.**

8. I certify that the agency is in compliance with all applicable federal, state, and local laws, ordinances and regulations including, but not limited to, the USA Patriot Act and all applicable anti-terrorist financing and asset control laws.

9. I certify that the agency received a copy of, understands and will comply with the terms of the Donor Designation Eligible Agency Standards of Participation, which may be amended at any time, in the sole discretion of the United Way.

10. I certify that I have included as **Attachment E a completed payment authorization** providing directions for the payment of designations that may be made to the agency through United Way's annual campaign.

11. I certify that donors who designate contributions to the organization will not receive any benefit or privilege in return for such designation. *Note: This certification is required in order for the organization to qualify as a Donor Designation Eligible Agency*

I certify that I have read all of the statements set forth in this document and that by checking the box next to the statement, I acknowledge and agree to comply with these statements.

|
Dated: _____

Signature: _____

Printed Name: _____

Title: _____

United Way of Greater Rochester
Donor Designation Eligible Agency Standards of Participation

Effective Date: July 24, 2009

As we work to build a stronger community, United Way of Greater Rochester is pleased to serve our donors by giving them options to designate their gift to a specific agency certified as eligible to receive designations (“Eligible Agencies”).

In order to best serve our donors, it is important that United Way and the Eligible Agencies agree to standards that outline expectations for our relationship. The current standards of participation apply to all donor designation eligible agencies.

Eligible Agencies agree to:

- Respond within thirty (30) days to requests for information from United Way.
- Notify United Way of any concerns or questions that may arise with regard to the Agency’s continuing eligibility to receive donor designated funds. (ex: agency closure, loss of tax exempt status)
- Support the annual United Way campaign by conducting an employee campaign and encouraging employees and constituents to support the United Way in addition to supporting the eligible agency, per United Way’s communication guidelines for agencies.
- Respond to information requests made by 2-1-1, the human services information and referral system.
- Complete the annual re-certification form to maintain donor designation eligibility,
- Comply with requirements that prohibit the agency from providing any benefit or privilege in return for a donor’s designation to the agency.

United Way agrees to:

- Provide Eligible Agencies with written notice of any United Way policy changes affecting them.
- Respond in a timely manner to questions or concerns about agency eligibility.
- Provide training and support to Eligible Agencies to conduct an employee campaign.
- Transmit designations made to Eligible Agencies less administrative costs and pledge loss allocations as determined in the sole discretion of the United Way.
- Provide Eligible Agencies with contact information for donors designating funds to the organization.

United Way reserves the right, in its sole discretion, to:

- Certify Eligible Agencies.
- Modify eligibility criteria and participation standards.
- Direct funds to a specific program or programs of an Eligible Agency.
- Suspend or terminate an Eligible Agency’s status for failure to honor United Way standards and policies.

**United Way of Greater Rochester
Payment Authorization Form**

The most efficient and preferred manner of payment from United Way to agencies is by electronic funds transfer, which is essentially direct deposit into the agency's bank account.

Please provide the following information regarding the account to which payments from United Way should be deposited.

Agency Name

Agency Address

Bank Name

Bank Transit Number

Bank Account Number

Type of Account (check one) Checking OR Savings

Please attach a copy of a voided check, deposit ticket or bank authorization.

Authorizing Signature _____

Printed Name and Title _____

*Please complete this paperwork and return it to:
United Way of Greater Rochester
Attn: Donor Designation Eligible Agency Application
75 College Avenue
Rochester, NY 14607*