



United Way of Greater Rochester Donor Option Agency Application Frequently Asked Questions

Thank you for considering an application to be a donor option agency with United Way of Greater Rochester. Please review these frequently asked questions before completing your application.

What is donor option? Donor option refers to the range of options donors have when making a contribution to United Way, including making a gift to the Community Fund and/or making a gift to a local not-for-profit organization.

What is a donor option eligible agency? It is an IRS and New York State Charities Bureau recognized, tax-exempt organization that provides direct health or human services in Genesee, Livingston, Monroe, Ontario, Wayne or Wyoming counties. This agency has been vetted and certified as an eligible agency by United Way of Greater Rochester to receive donor directed gifts through the annual campaign.

In order to be a donor option agency, does the agency's primary purpose need to be providing health and human services? Yes, the primary mission must focus on health and human service, and provide a health and human service as one of its primary program components. *The health and human service provided by the agency needs to be detailed in the application.* Depending on your agency, the health and human service program may be listed on the donor options list along with your agency name.

What is United Way's definition of a health and human service agency? A health and human services agency is an organization that addresses the health, social, and basic needs of individuals, families, households, and communities through a range of direct service programs.

What is direct service? Direct service is the delivery of assistance and/or care to the individual, family or household through direct or personalized interaction.

What documents do I need to complete my application? The most recent versions of the following documents:

- IRS Determination Letter*
- 990* (990-EZ and 990-N are accepted as well)
- CHAR500*
- Board of Directors listing (with contact information)
- Payment Authorization Form (with cancelled check or bank letter)

**A written exemption from the IRS or NYSAG Charities Bureau is acceptable in lieu of these documents.*



What is an IRS determination letter? It is a letter from the IRS recognizing an organization's tax-exempt status and indicating under which section of the Internal Revenue Code the agency is qualified. The determination letter is the only official document that shows an organization is recognized by the IRS as a tax-exempt. This letter also contains your agency's Employer Identification Number.

What does 501(c)(3) mean? 501(c)(3) refers to the part of the Internal Revenue Code describing certain tax-exempt organizations. The 501(c)(3) designation denotes a charitable organization is eligible to receive tax-deductible contributions.

How does my organization become a 501(c)(3)? Information about 501(c)(3) status can be found at the Internal Revenue Service website:
<http://www.irs.gov/charities/charitable/index.html>.

What are the federal filing requirements? According to the IRS, tax-exempt organizations must file an annual information return. Annual forms include the 990, 990-EZ and the 990-N. Information about these forms is on the Internal Revenue Service's website.

What is the Charities Bureau of NYS? The Attorney General's Charities Bureau is the NYS department responsible for ensuring that charities operating in New York State solicit and use funds in accordance with regulations established to protect donors and agency clients.

What is the CHAR500? The CHAR500 is the Annual Filing for Charitable Organizations required for charitable organizations registered with the NYSAG Charities Bureau. For more information on this filing, visit the Charity Bureau's website

How do I know if my organization must register with the Charities Bureau or is exempt from registering? Information on registering with the Charities Bureau can be found at the Charities Bureau website: <http://www.charitiesnys.com>. All organizations must provide with their application, either a CHAR500 or certificate of exemption from the NYSAG Charities Bureau.

My agency hasn't yet filed a 990 or CHAR500, would we still qualify? No. In order to qualify as a donor designated agency, you need to have filed these documents with the federal and state governments, or provide proof of exemption from filing these documents.

What is the payment authorization form? The payment authorization form provides banking information needed to electronically transfer payments of designations directed to a specific agency through the United Way campaign. Using this process reduces the overall costs for United Way payment processing and allows the agency to access funds sooner.

When are applications accepted? July and August 2021 and biennially after that.



How do I get help with completing the donor options eligible agency application? Applying agencies are responsible for completing the application. Agency staff, volunteers, agency attorneys or accountants may be helpful resources. The application requires only the most basic items necessary of not-for-profits operating legally in the State of New York and is meant to be simple to complete. Once submitted, your application will be considered final.

When will I hear about the status of my application? Our annual formal review of applications for donor option agencies takes place in September. You will be contacted by a United Way representative after the review process is complete in October.

If accepted, will my agency's name appear on United Way of Greater Rochester's donor options list? Yes. United Way of Greater Rochester maintains an updated online version of the donor options list for donors to access. The hard copy list is printed once per year in the fall.

What is the role of the agency's donor options contact? The agency contact is the only agency representative that will receive emails and notifications concerning pledges and payments and will have access to United Way of Greater Rochester's online agency portal. The agency needs to keep United Way informed of changes to the contact information.

What are the United Way of Greater Donor Option Eligible Agency Standards of Participation? These standards help to more clearly define the roles and expectations of both a donor options agency and United Way of Greater Rochester. When you submit your agency's application, you agree to adhere to the standards of participation.

If my application is denied, are there other ways that my organization can fundraise with United Way? Yes. If you are a 501(c)(3) organization, we invite you to apply to participate in our ROC the Day event and/or the SEFA campaign:

- ROC the Day is our community's 24-hour online giving event that all local not-for-profits in the Greater Rochester region can participate. ROC the Day is held on the first Tuesday after Thanksgiving each year. Not-for-profit registration opens in October. More information can be found at <http://www.roctheday.org/>
- The State Employees Federated Appeal (SEFA) campaign is a separate fundraising effort supported by employees of New York State. The SEFA campaign runs in the fall. Applications are accepted from mid-December through mid-January each year and can be found at <http://www.sefanys.org/>.
- *Please note that the SEFA campaign, the ROC the Day event and United Way of Greater Rochester's local campaign each have a separate application process.*

If you have further questions, please contact Nia Sargeant at donorchoice@uwrochester.org