

Donation Processing Questionnaire 2009 Campaign

Company Name: _____
Completed By: _____ Job Title: _____
Email: _____ Phone: _____
Company's Processing Contact (if different from above): _____
Job Title: _____
Email: _____ Phone: _____

United Way Capital Area (UWCA) strives to process donations efficiently and accurately, and completing the below information is invaluable.

Paper pledge form accuracy: UWCA will make a reasonable effort to locate and make payouts to incomplete agency designation information; however, if the agency can not be identified or located, employee gifts will be designated to UWCA. To ensure accurate pledge payouts we ask that corporate campaign staff review all paper pledge forms for accurate designation information (complete address/contact information) and work with the donor to capture accurate information prior to submitting to UW or corporate offices for processing.

Please return the completed form to your United Way representative or email it to lauren.paver@unitedwaycapitalarea.org.

A. Donation Results

1. If employee pledge information has not already been submitted, what is the expected timeframe or date UWCA should expect it?
Date: ____/____/____
2. Please indicate below how UWCA should expect to receive donation results.
 - a. Format (mail, email, etc.) _____
 - b. Results will come from
Company contact 3rd Party Processor
Company or Processor: _____
Name: _____
Address, City, State, Zip: _____
Phone/Email: _____
Contact Person: _____
3. Will there be an accompanying report sent detailing all donor names, amounts, and any gift designation information (i.e. agencies benefiting from donor's gift)?
Yes No
4. Is there a corporate gift or match of employee contributions? Yes No
 - a. If so, please indicate the match ratio
\$1:\$1 \$0.50:\$1 Other: _____

- b. Is there a cap on the match?
Yes _____ No
- c. Where are match dollars directed?
United Way
Agencies selected by the employee's gift
- d. When and how will UWCA receive corporate pledge results?
Date: ____/____/_____
Format (mail, email, etc.) _____
Same as in 2. b. above
If different, please complete the below information:
Company contact 3rd Party Processor
Company or Processor: _____
Name: _____
Address, City, State, Zip: _____
Phone/Email: _____
Contact Person: _____

B. Payment Information

1. Does the company process employee pledges internally or is a third party involved in processing and distributing funds to agencies?
 - a. If a third party is involved, who should UWCA expect payments to come from?
Company Name: _____
Address, City, State, Zip: _____
Phone/Email: _____
Contact Person: _____
 - b. If the company processes donations, please indicate below which company location payments for employee pledges and/or corporate pledges will come from.
Company Name: _____
Address, City, State, Zip: _____
Phone/Email: _____
Contact Person: _____
 - c. Are all employee pledge dollars sent to United Way for disbursement to agencies?
Yes No
2. When will the company begin payroll deductions?
Date: ____/____/_____
3. When should United Way Capital Area expect the first payroll payment for the 2009 employee giving campaign?
Date: ____/____/_____
4. How often will payroll payments be sent?
Weekly Bi-Weekly Monthly Quarterly

5. What is the expected date United Way will receive any corporate gift or match dollars?

Date: ____/____/____

a. Please specify how often corporate match dollars will be sent.

Weekly

Bi-Weekly

Monthly

Quarterly

To help us apply payments correctly, please include the below pertinent information with each payment:

- Payment Type (employee payroll, corporate gift, etc.)
- Campaign year (2009 Campaign or for payroll deductions taken between 1/1/2010 and 12/31/2010)
- Payment Schedule (1st Quarter payment or for payroll deductions taken between 1/1/2010 and 3/31/2010)
- Please email an electronic document that contains donor names and amounts with each payment which allows UWCA to pay out any designations more accurately. Send email to finance@unitedwaycapitalarea.org.

Thank you for taking the time to provide us with this information.