



United Way of Southeastern Pennsylvania
DONOR CHOICE PROGRAM
Guidelines on Agency Eligibility, Program Policies and Administration

OUR MISSION

To harness, leverage and strategically invest the collective power of donors, advocates and volunteers, to drive measurable results that improve the lives of people in our region.

ACHIEVING OUR MISSION

How can we accomplish so much in our community? The answer is simple: community agencies, volunteers and donors make it happen. They allow us to achieve our goals and fulfill our mission.

As of September 2011

DONOR CHOICE PROGRAM

United Way mounts a community-wide campaign each year to raise funds from companies, foundations and individuals for human health and social services. Through the Donor Choice Program, donors can direct their gifts to a specific non-profit human service agency of personal interest to them. After more than 25 years of operation, the Donor Choice Program continues to be a popular service with United Way donors, especially those who give at the workplace through payroll deduction. More than 5,000 such organizations receive gifts each year through the United Way Campaign.

United Way can only transmit to agencies those gifts that United Way actually receives. Some pledges are never paid in to United Way, because donors change jobs or move away. Of those gifts from the fall 2010 Campaign that United Way receives, we will pay over 87 cents of every dollar to the designated agency. The 12.5 percent administrative fee that we retain covers United Way's cost of raising the funds, funds that most recipient agencies would never collect if United Way's annual campaign did not take place.

Most donors pay their pledges through payroll deduction, a little at a time, over the course of a calendar year. Most employers aggregate these deductions and pay them in to United Way as monthly or quarterly payments. A pledge made in the fall of 2010 may not be fully paid in to United Way until the spring of 2012. This is why agencies may not fully collect a donor's gift until many months after it is pledged. United Way makes every effort to transmit donor designated gifts in as timely a manner as is consistent with low administrative fees for recipient agencies.

This booklet provides a full overview of Donor Choice policies and administrative procedures.

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SECTION I

REQUIREMENTS FOR AGENCY ELIGIBILITY DETERMINATION

APPLICATION PROCESS

An agency enters into the application process by one of two ways: (1) through a donor designation during our annual campaign, or (2) application by a non-profit organization directly.

The typical application flow is as follows:

- ⇒ Donor designation is received by United Way or request received from agency, either online at www.uwsepa.org or through the mail. Requests directly from agencies must be accompanied by a \$100 check to cover processing costs, since there is no accompanying gift from a donor.
- ⇒ Application kit mailed to agency
- ⇒ Application completed and returned to United Way, within four weeks with all required attachments
- ⇒ Application reviewed for completeness and compliance
- ⇒ Eligible or Ineligible status determined; agency notified of outcome in writing

Organizations that require additional time for application completion should request an extension of the due date by writing to Customer Operations Manager, United Way, Seven Benjamin Franklin Parkway, Philadelphia, PA 19103. Email requests are acceptable and may be sent to agencyreporting@uwsepa.org. United Way holds all designated monies until such time as an eligibility decision has been determined. Donors who designate an ineligible organization or an organization who does not complete their application within the specified timeline are advised in writing that the organization they have designated is not eligible to receive funds, and the donor is asked to redirect the gift.

CORE ELIGIBILITY CRITERIA

For an agency to be eligible, each element of the core criteria must be met. An agency must:

- have a federal tax exempt/tax deductible status of 501(c)(3), and;
- provide services in the United States, and;
- exist primarily to provide or support voluntary human health or social services, and;
- comply with the provisions of the USA Patriot Act. USA Patriot Act compliance is assessed through review of the OFAC terror watch lists. USA Patriot Act compliance is re-assessed annually.

Note: Agencies with tax exempt/tax deductible status other than 501(c)(3) are not eligible for designation through the United Way Campaign. This ruling by our Board of Directors insures a full tax deduction for our donors, and program consistency with the mission of United Way of Southeastern Pennsylvania.

ELIGIBLE FIELDS OF SERVICE & TYPES OF ELIGIBLE ORGANIZATIONS

The language “human health or social services” refers to programs and activities that are designed to meet human needs. The following list of eligible fields of service and types of eligible organizations illustrates the intent of this requirement:

- After-school, weekend and summer programs for school-age youth
- Assistance to individuals in finding or obtaining services or benefits, including information and referral programs
- Child welfare services that protect children from abuse or neglect, including family preservation, foster care and adoption services
- Crime prevention, offender rehabilitation
- Early childhood education/child care for children
- Educational enrichment programs for youth in out-of-school hours
- Emergency shelter and transitional housing for persons at risk of homelessness
- Employment services – job search, job training and placement
- Family and individual counseling services
- Financial aid to needy persons
- Food, clothing, housing services, housing information
- Foundations, federations, and other funding organizations (so long as the primary goal of the organization’s overall activity is serving human health or social service needs)
- Health care, physical rehabilitation, hospitals
- Health and mental health education
- Homemaker services and home health care
- Mentoring and leadership development programs for youth
- Nutrition-related programs including emergency food banks
- Personal financial management, budget counseling and financial education
- Recreation, and programs that foster social growth, inter-group relations, social functioning
- Retirement homes and domiciliary care (the retirement facility must make provision for the continued care of persons without funds, or those who cannot pay the full cost or care)
- Senior citizen programs including day care and home-delivered meals
- Services related to sexual assault and domestic violence, including crisis intervention and legal services
- Social and community organization, promotion of volunteerism, community planning
- Other United Ways
- Other general social service organizations not included above, that seek to further the following goals:
 - Preventing illness and promoting good physical health
 - Preventing or helping to resolve behavior, relational, and mental health issues
 - Preparing children to be ready to start school
 - Keeping children and youth engaged in school and on track to graduate from high school
 - Re-engaging unemployed youth and dropouts to enable them to become independent adults
 - Providing adults with basic educational skills and credentials
 - Equipping and assisting adults to obtain and keep jobs
 - Equipping adults to attain financial stability
 - Enabling adults and families to transition from homelessness to self-reliance and independence

- Improving the ability of persons with chronic illness, disability or age-related imitations to cope with daily living requirements
- Promoting social interaction and reducing isolation for seniors
- Building community and improving neighborhoods
- Providing a safety net of basic services for individuals and families
- Preparing for and providing relief from disasters
- Improving the capacity of the nonprofit sector

EXAMPLES OF INELIGIBLE FIELDS OF SERVICES (not an all-inclusive list)

- Religious Institutions
- Libraries
- Animal Welfare
- Disarmament, Nuclear Weapons, Peace Groups
- Environmental Organizations
- Government agency and electoral activities, whether partisan or nonpartisan
- Economic Development
- Cultural Organizations (museums, orchestra, theaters, ballets)
- Schools, colleges, alumni funds, public or private

ELIGIBLE PROGRAMS OF INELIGIBLE ORGANIZATIONS

Organizations that are not eligible may have programs or services that separately meet the eligibility criteria. The following financial assessment will determine whether the potentially eligible program is “significant and distinct” from the ineligible services of the organization. Items A through C must be met with full documentation provided.

- A. Agencies must expend at least 5 percent of their annual budget or \$100,000 on the eligible program, whichever is less.
- B. The applicant program must **appear as a line item** in the organization’s fiscal report or audit, or appear in the annual or public reports of the organization, and;
- C. The applicant program must have clearly **defined goals and objectives**.

To the extent an organization becomes eligible under these circumstances, the eligible program, in addition to the agency name, will be included in United Way’s agency listing as opposed to solely the agency name. In addition, funds will be disbursed to the organization in the name of that program and are expected to be used only to fund the program for which they were designated.

CONTINUITY OF ELIGIBILITY

Eligible organizations retain their status until such time as there is a change in their original qualifying status. Formal review and verification of eligibility will occur on at least a 5-year cycle or anytime eligibility is in question. All eligibility reviews will be conducted in advance of the campaign so agencies will know of their status before the official campaign period.

AGENCY ID NUMBER

All eligible organizations are assigned an ID or “book” number, which remains consistent from year to year. Use of this number increases accuracy on the donor’s part when designating, since many agencies have similar names. Occasionally, modifications to our agency database may require the assignment of a new ID number; if this occurs the agency will be notified in writing.

Please note that the United Way of Southeastern Pennsylvania currently manages the local Combined Federal Campaign (CFC) under contract with the Office of Personnel Management of the Federal Government. A list of agencies approved for participation in the CFC is published as part of this work. The ID numbers assigned to agencies in this book are established by the Office of Personnel Management.

APPEALS PROCESS

An applicant can appeal a decision that their agency is ineligible to receive designations by submitting in writing, all pertinent information that will clarify or supplement the original application, enabling UWSEPA to reach a favorable decision. Appeals may be submitted to:

Customer Operations Manager
United Way of Southeastern Pennsylvania
Seven Benjamin Franklin Parkway
Philadelphia, PA 19103

SECTION II

DONOR CHOICE PROGRAM ADMINISTRATION

United Way mounts a community-wide campaign each year to raise funds from companies, foundations and individuals for human health and social services. Through the Donor Choice Program, donors can direct their gifts to a specific non-profit human service agency of personal interest to them.

The Donor Choice Program is primarily offered to donors through United Way workplace campaigns. The program is also available to individual donors or retirees.

Recipient agencies may solicit their own employees, and distribute Donor Choice pledge forms and other campaign materials to those employees, after making appropriate arrangements with our Fund Raising/Resource Development Division. These pledge forms are not intended for distribution by agencies other than to their own employees, since the great majority of donors give through payroll deduction which must be managed by their employer.

DONOR CONFIRMATION

UWSEPA will confirm each pledge and designation directly with the donor, promptly upon processing of the donor's pledge information. Receipt of the confirmation is affected by delays in receiving the pledge data from the employer; however, every effort is made to promptly issue these notices. This procedure also provides the donor with an opportunity to verify the recorded information.

Except in situations in which the donor wishes to remain anonymous or prefers not to be acknowledged for his or her gift, we ask that you also send a confirmation or thank-you letter to the donor. **Agencies should thank donors for the gross amount of the gift**, not the amount net of United Way's administrative costs. Thank you letters for the net amount frustrate and confuse donors. The administrative fee is a cost to the organization's participating in this program – not a charge to the donor.

POLICY ON MINIMUM DONATION AMOUNT

The minimum donation to each Donor Choice agency is \$24 per donor, due to the administration involved in managing each separate gift. .

PLEDGE COLLECTIONS

UWSEPA is responsible for the collection process, which includes sending billing statements on a quarterly basis, as well as personal follow-up for higher dollar and consistently lagging pledge payments. We ask that you do not send collection notices to any donors directly.

DONOR TAX RECEIPTS

UWSEPA will send each donor a tax receipt for non-payroll payments as required by IRS regulations.

AGENCY NOTIFICATION OF DESIGNATIONS AND DONOR INFORMATION

Lists of donors and their gifts to your agency are available on United Way's online Agency Reporting System. This system gives agencies up-to-date donor listings, as well as providing pay-out reports. Each agency is provided with a secure and unique access code to this system, which enables it to view just its own information and to view it as frequently as desired.

Instructions for UWSEPA's online Agency Reporting System

1. Go to:
 - a. <http://www.uwsepa.org/epldgeredirect.asp> OR
 - b. www.uwsepa.org
 - i. Click on Agency Home
 - ii. Select Agency Reports Login – This will open the United Way e-Business Portal.
2. Enter your User ID and Password (see the frequently asked questions section if you need assistance in determining your user id or password)
3. Click Login

Reports (All reports are subject to change)

- **Donor List (Acknowledgements to Agencies Report):** This report lists all donors and amounts of designations to your organization and should be used when generating thank-you letters to your donors. The report is divided into three sections: (1) Donors who wish to remain anonymous, (2) Donors who have authorized the release of their name to the agency, but do not want to be acknowledged and (3) Donors who have authorized the release of their name and have requested an acknowledgement. This report can be generated at any time and is available in .PDF and .CSV.

This report should be used when generating thank you letters to your donors. It lists all the designations to your organization with the amounts designated and the number of donors.

- **Payment Detail (DCP Payee Report by Organization):** This report shows the administrative expenses and payments due to the agency and lists all donors grouped by organization. It will assist the agency with determining how the payment was calculated for the current pay-out. The donor's organization is not disclosed in the report.

Additional Portal Options

- **My Submitted Reports:** Once you have submitted a report, go here to view the completed report.
- **Maintain Contact Information:** Maintain your agency's employee contacts here. To receive email notifications when a deposit is made someone will need to be entered as the *Finance Contact*.

To add a Finance Contact:

- Click on Add Contact
- Click Add New Contact
- Enter at least the Name, Email address, & Contact Type
- Select Finance Contact as the Contact Type
- Click Add Selected Contact

- **Maintain Banking Information (ACH):** You can enter your agency's banking information to receive ACH Deposits. Come here to maintain your banking information too.

Questions and concerns, login assistance, and technical support may be directed to the United Way Helpline at 215-665-2598 or 1-800-417-8742.

PROMOTIONAL GUIDELINES FOR PARTICIPATING AGENCIES

United Way administers a single campaign at the workplace that mobilizes and facilitates giving to over 3,000 health and human service agencies each year. In order to keep non-profit fundraising costs low and provide an equal opportunity for all participating organizations to

compete, the following marketing guidelines have been established in the best interests of the system as a whole.

Agencies receiving funds from the United Way Campaign should not:

1. approach employer(s) with regard to mounting a workplace-based charitable giving campaign on the organization's behalf;
2. purchase advertising that promotes the organization's donor designation number during the period Sept 30 through Nov 30, in mass media targeted to the general public such as television, major newspapers or billboards; and/or
3. ask United Way donors to give to them directly instead of as part of the United Way Campaign, or otherwise discourage donors from participating in the United Way Campaign.

United Way asks that agencies receiving funds from the Campaign comply with these guidelines in order to be included in our Campaign marketing.

USE OF THE UNITED WAY LOGO

The United Way logo is a trademark copyright of United Way of America. Use of the logo is restricted to United Ways except by express written agreement.

SECTION III

PROGRAM COSTS & PAYMENT OF DONOR DESIGNATIONS

FUNDRAISING & ADMINISTRATIVE COSTS

Fundraising, processing and administrative costs are recovered through a charge that is applied as a percentage of each donor gift. The cost is calculated annually and approved by the United Way Board. This information is communicated to recipient agencies with the first payment on designations.

PAYMENT OF DESIGNATIONS

Payments to designated agencies for each fall's campaign will be issued according to the following schedule:

		Minimum Payment*	Payment Type**
Payment #1	December	\$10	ACH & Paper Checks
Payment #2	February	\$10	ACH & Paper Checks
Payment #3	April	\$10	ACH Only
Payment #4	June	\$10	ACH & Paper Checks
Payment #5	August	\$10	ACH Only
Payment #6	October	\$10	ACH Only
Payment #7	December	\$10	ACH Only
Payment #8	August	\$10	ACH & Paper Checks
Payment #9	October	\$10	ACH Only
Final Payment	December	None	ACH & Paper Checks

* If amount does not meet the minimum threshold to be paid at that time, it will be rolled into the next payment. This policy is to limit the number of checks written for very small amounts, and help keep administrative costs low for agencies. At the end of the payment schedule, the minimum is lifted so that agencies with lower donation amounts will receive complete payment.

**Payments #1 & #2 will consist primarily of cash payments by donors; subsequent remittances will pay on campaign dollars received-to-date.

The payout is based on amounts actually received as of a given cutoff date, and a minimum dollar threshold for payment is set (\$10, except for final payment). As such, you may not receive a payment in each payout.

United Way encourages all agencies to sign up for ACH payments via our online reporting site. Electronic payouts honor the donor's desire to get their donation to you as quickly as possible, help maintain our low cost structure and enable United Way reduce paper.

Organizations that do not provide us with banking information may be limited in the frequency and quantity of their payments.

UNCOLLECTIBLE PLEDGES

United Way pays agencies based upon actual collections from donors whenever donor level detail is provided. When donor payment detail or termination data is not provided on payroll payments, those payments are applied proportionately to all payroll donors for that company. As such, all gifts will share in the overall uncollectible rate of the company's payroll deduction pledges. The application of that uncollectible rate may be spread across all donors in that company, but is not spread or projected across the entire Campaign. **It is important to note that uncollectible amounts are not a "charge" taken by United Way. United Way pays all dollars that are received above our administrative costs.**

Prior collection experience has demonstrated that approximately 7-8% of designated gifts that are pledged will not be paid to United Way. The primary reasons are pledge cancellation by the donor, corporate downsizings, plant or business closings, employer relocation, and donors who change employers during the payment cycle and cannot be located. Agencies should therefore expect to receive, on average, approximately 80 percent of total dollars pledged (the other 20 percent comprised of 7-8 percent never paid by the donor and the 12.5 percent administrative fee). It is important to note, however, that this will vary dramatically based upon the payment type. Donors paying by cash, check or credit card are less likely to be unpaid, as they are mostly collected up front. It is payroll donors who are more likely to have an uncollectible balance due to the fact that these dollars are collected over the course of the year FOLLOWING the year in which the pledge is generally made (see below) and the fact that their company may not give us employee payment detail (see above).

FUNDS AVAILABLE FOR PAYMENT

Because United Way payments to agencies are based on the amount **received** in any collection period, the donor's method of payment will impact when dollars reach the agency.

Designations paid by cash, check, credit cards, securities transfer, and directly billed donors

These pledge payments will be remitted to the recipient agency in the next regularly scheduled payment, less the standard administrative & fundraising cost, after receipt of the payment. For example, Donor X pledges \$100 through the fall 2010 United Way Campaign and pays the entire amount by check in November 2010. The recipient agency will then receive \$87.50 through the first payout in December, which represents the entire amount due to them.

Designations paid by payroll deduction withholdings

Approximately 80% of donors utilize payroll deduction as the method of payment. This method is often the most convenient for donors, as the gift is deducted over an entire year's payroll cycle. The following factors do influence the level of dollars that reach the agency:

- the frequency of payroll withholding payments from the company to United Way (does the company remit the withholding to United Way on a monthly, quarterly, semi-annual or annual basis?)
- the overall internal collection experience of each company (were there layoffs, or business reorganizations?)

Please note that United Way's administrative costs are recovered up front, since United Way's costs are incurred before the funds are collected. Example: your agency receives a \$1,000 designation and our fee is 12.5%. The first payment we receive is a check of \$200. United Way will retain \$125 (12.5% of \$1,000) and \$75 will be paid to your agency. Thereafter you will receive the entire amount of each payment.

Most companies remit payroll payments to United Way in lump sum, versus including payment detail by donor. As such, payroll payments are spread proportionately across ALL payroll donors for that company. The actual payment by donor may vary from the amount deducted from their pay as a result of the overall uncollectible payroll payment rate for that company being applied to ALL payroll donors at that company.

Following are several scenarios of how payroll deduction payments are remitted to agencies. It is important to note that there is almost always a timing difference between when a donor pledges, when they appear on an agency's donor list and when an agency is paid. If the donor pledges via payroll deduction in the fall, United Way will not begin to be paid until the following year, as the vast majority of payroll deductions take place on a calendar year basis. Depending on the frequency of payments from the company, this can create a significant lag between the time a donor pledges and the time an agency gets paid.

EXAMPLE 1:

John Doe works at Company X and pledges \$200 to Agency Y during the Company X Campaign. John writes a check for \$100 and turns that in with his pledge form on Sept 30, asking that the other \$100 be taken out of his pay. The \$100 check is turned in to United Way at the end of the Company X Campaign on October 30 (one month after the donor wrote their check). United Way sends a check for \$75.00 to Agency Y with the first payout in December (\$75.00 is calculated as the payment of \$100 less the overall fee of 12.5% * \$200, which is based upon the total pledge and recovered from the first dollars collected)

In January, Company X begins deducting John's \$100 payroll gift from his pay. Because Company X pays twice a month, the deduction is \$4.17 per pay. Company X transmits payroll deduction gifts to United Way on a quarterly basis, one month after the end of each quarter but without identifying which employees the payment covers.

At the end of the first quarter the company sends the one quarter of all payroll gifts pledged to United Way, and United Way pays out \$25.00 in April to Agency Y on behalf of John Doe's gift. These same payments are again made at the end of the second quarter.

By July some of the Company X employees have left their jobs and are therefore not fulfilling their pledges. United Way receives only 92% of pledged payroll gifts in the next company payment. United Way spreads this reduction across donor gifts from that company proportionately, thereby calculating that John Doe has paid only 92% of his \$25 pledge that quarter, or \$23. United Way sends a check for \$23 to Agency Y with its next scheduled payout in October.

The same circumstances exist for the fourth quarter payment and United Way prorates the company payment such that John's final payment is recorded as another \$23 in January.

Overall, Agency Y will receive \$170.80 of a \$200 pledge. The net difference is \$29.00 – made up of \$25.00 relating to United Way's cost recovery and \$4 related to the uncollectible pledges distributed across all donors in that company's campaign (please note that this is not a "charge" by United Way, but simply the amount that is not collected – United Way pays out all dollars collected in excess of our cost recovery portion). The final payment on the company's payroll gifts will be received by United Way approximately 16 months after it was pledged, and United Way will then pay Agency Y its final installment of the gift in February.

EXAMPLE 2:

Donor X works at Company Y and pledges \$200 in October to Agency Z through the Company Y Campaign. Donor X requests that his pledge be paid through payroll deduction. In January, Company Y begins deducting Donor X's \$200 payroll gift from his pay. Because Company Y pays twice a month, the deduction is \$8.33 per pay. Company Y transmits payroll deduction gifts to United Way on a quarterly basis, one month after the end of each quarter and includes termination information on donors that left the company since the prior payment, so that United Way can write off their remaining balances. When United Way receives Company Y's first quarter payment, \$50 is applied to Donor X's pledge. United Way then sends Agency Z a check for \$25 in April (\$25 is calculated as the payment of \$50 less the overall fee of $12.5\% * \$200$, which is based upon the total pledge and recovered from the first dollars collected). The same payment is made to United Way at the end of the second quarter, third and fourth quarters, with accompanying termination data. Since Donor X did not terminate, \$50 is remitted to Agency Z in July, October and February. Overall, Agency Z will receive \$175 of a \$200 pledge. The net difference is \$25, which represents United Way's administrative fee.

EXAMPLE 3:

Donor X's scenario begins as in Example 2. When the third quarter payment arrives however, Company Y notifies United Way that Donor X terminated on June 30th, and, as such, his balance should be written off. United Way writes off Donor X's remaining balance of \$100 and Agency Z receives no further payments on his gift. Overall, Agency Z receives \$75 of a \$200 pledge. The net difference is made up of the \$25 cost recovery and \$100 uncollectible amount resulting from Donor X's termination from Company Y.

FREQUENTLY ASKED QUESTIONS

1. How do I get a list of my donors?

An up-to date list of donors can be generated online at any time. This list can be obtained by running the Donor List (Acknowledgements to Agencies Report) in our online reporting tool.

2. How do I access online reporting?

- (1) Go to:
 - <http://www.uwsepa.org/epledgerredirect.asp> OR
 - www.uwsepa.org
 - Click on Agency Home
 - Select Agency Reports Login – This will open the United Way e-Business Portal.
- (2) Enter your User ID and Password (see the frequently asked questions section if you need assistance in determining your user id or password)
- (3) Click Login

3. I don't know my User ID and Password. How do I get that information?

If you don't know the agency's United Way account number or experience any problems logging in, please call the United Way Helpline at 215-665-2598 or 1-800-417-8742.

4. I don't see John Smith, but I know he designated to us. Why isn't he on the report?

There are several reasons that a donor may not appear on the report including, but not limited to:

- (1) The donor may have requested to be anonymous.
- (2) United Way may not have received the donor detail from the company yet.

5. Why haven't I received the money for Brian Q. Donor?

A lot of factors affect how quickly the agency will receive money for individual donations including, but not limited to:

- (1) The donor may have requested to be billed and United Way has not yet received the money.
- (2) The timing between when United Way receives the payroll check from the company or the payment from the donor and United Way's pay-out cycle.
- (3) The total amount due to the agency may be less than the pay-out check amount minimum.
- (4) United Way deducts expenses from first dollars in, which reduces the total amount due in the first pay-out.

6. Why are so many of my donors "anonymous"?

When large numbers of donors from a particular company are labeled anonymous, it is usually because of a decision that their employer has made with regard to confidentiality.

7. My report is blank. Does that mean I don't have any donors?

Please ensure the report was generated for the correct campaign year. There is a possibility that United Way has not processed any designations for your agency at the time the report was generated. If you know you have received designations but your report is still blank, please call the United Way Helpline at 215-665-2598 or 1-800-417-8742.

8. I ran my report three weeks ago, but now I don't see it. Where is it?

The system automatically purges all reports after 30 days, so please save any report that you would want to access at a later date.

9. When I ran my report in August, I had 5 donors. Now I only have 3 donors. What happened?

Online reporting allows the agency to view donor detail as quickly as it is processed by United Way. This means that results are subject to change. The donor may have changed their designation to a different agency or cancelled their pledge.