

75 Market Street  
Poughkeepsie, NY 12601  
Tel (845) 471.1900  
Fax (845) 471.1933

[www.uwdor.org](http://www.uwdor.org)

30 Scott's Corners Drive, Suite 102  
Montgomery, NY 12549  
Tel (845) 471.1900  
Fax (845) 457.4702



## United Way of the Dutchess-Orange Region Campaign Charter

*There are many ways to structure and conduct a workplace campaign. It is important the campaign plan works for your organization and employees. A United Way representative will work directly with a representative of your organization (Employee Campaign Manager) to help facilitate a successful campaign.*

Organization Name and Address \_\_\_\_\_  
\_\_\_\_\_

Chief Executive Officer \_\_\_\_\_

Employee Campaign Manager/Title \_\_\_\_\_

ECM Contact info (email/phone) \_\_\_\_\_

Campaign Dates Start \_\_\_\_\_ Finish \_\_\_\_\_  
MM/DD/YYYY MM/DD/YYYY

Would your organization consider an online campaign? Yes \_\_\_\_\_ Number of Employees \_\_\_\_\_

Desired Campaign Materials \_\_\_\_\_  
\_\_\_\_\_

Number of Presentations Requested and Location(s) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Can organization donate incentives? If so, please describe \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Campaign notes:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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## 2015 PAYROLL AND PLEDGE REMITTANCE PREFERENCES

*Organizations facilitating workplace campaigns provide United Way of the Dutchess-Orange Region with campaign paperwork which includes copies of employee pledge forms and/or excel spreadsheets listing donor pledges. United Way processes the paperwork and payments and sends pledge balance reminders. To help ensure United Way's records are accurate, please complete the information below confirming the correct contact at your organization as well as dates for payroll contributions and billing.*

### Payroll Department Contact

Name \_\_\_\_\_

Title \_\_\_\_\_

Email Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Payroll Deduction Dates: First Deduction Date \_\_\_\_\_ Last Deduction Date \_\_\_\_\_

Comments \_\_\_\_\_

Pledge Remittance Dates to United Way: Weekly \_\_\_ Monthly \_\_\_ Quarterly \_\_\_ Annual \_\_\_ Other \_\_\_

Comments \_\_\_\_\_

Bill Organization for Pledge Balances Monthly \_\_\_ Quarterly \_\_\_ Annual \_\_\_ Do Not Bill \_\_\_\_\_

Comments \_\_\_\_\_

Number of Pay Periods Per Year 52 \_\_\_ 26 \_\_\_ 24 \_\_\_ 12 \_\_\_ other (please specify) \_\_\_\_\_

Comments \_\_\_\_\_

*Thank you for partnering with United Way of the Dutchess-Orange Region and joining us in supporting our community.*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
UWDOR Representative

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## ADDITIONAL BRANCH LOCATIONS

**Organization Name** \_\_\_\_\_

**Total Number of Branches** \_\_\_\_\_

**Branch Address** \_\_\_\_\_

**Branch Phone Number** \_\_\_\_\_

**Primary Contact** \_\_\_\_\_

**Email Address** \_\_\_\_\_

**Phone Number** \_\_\_\_\_

**Presentation at this location?** Yes \_\_\_\_\_ No \_\_\_\_\_

Date(s) \_\_\_\_\_

**Branch Address** \_\_\_\_\_

**Branch Phone Number** \_\_\_\_\_

**Primary Contact** \_\_\_\_\_

**Email Address** \_\_\_\_\_

**Phone Number** \_\_\_\_\_

**Presentation at this location?** Yes \_\_\_\_\_ No \_\_\_\_\_

Date(s) \_\_\_\_\_

**Branch Address** \_\_\_\_\_

**Branch Phone Number** \_\_\_\_\_

**Primary Contact** \_\_\_\_\_

**Email Address** \_\_\_\_\_

**Phone Number** \_\_\_\_\_

**Presentation at this location?** Yes \_\_\_\_\_ No \_\_\_\_\_

Date(s) \_\_\_\_\_

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## 2015 Campaign and Customized Engagement Opportunities

Strengths: \_\_\_\_\_

\_\_\_\_\_

Obstacles: \_\_\_\_\_

Known Losses: \_\_\_\_\_

\_\_\_\_\_

Donor Retention Strategies: \_\_\_\_\_

\_\_\_\_\_

Donor Growth Strategies: \_\_\_\_\_

\_\_\_\_\_

Donor Acquisition Strategies: \_\_\_\_\_

\_\_\_\_\_

Volunteer Leadership \_\_\_\_\_

\_\_\_\_\_

Companywide Engagement/Volunteer Engagement Opportunities: \_\_\_\_\_

\_\_\_\_\_

Year Round Communication Opportunities: \_\_\_\_\_

\_\_\_\_\_

Recognition Strategies: \_\_\_\_\_

\_\_\_\_\_

Corporate Gift: \$ \_\_\_\_\_

Marketing Dollars: \$ \_\_\_\_\_

GOAL: \$ \_\_\_\_\_

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## SUPPLEMENT

### Our Mission & Vision

**Our Mission:** United Way of the Dutchess-Orange Region builds a stronger, healthier community by raising resources and forging partnerships that make a measurable difference in people's lives.

**Our Vision:** As the area's premier impact organization, United Way of the Dutchess-Orange Region serves as a catalyst to increase the community's capacity to improve the lives of its citizens.

We have a vision into the future that is strongly focused on a movement that joins together all sectors of the community. It includes **Government, Business, Community Members, Non-profit and Education** to utilize community assets to develop regional responses that bring about positive, measurable change to the issues facing our communities

### Workplace Campaign

A workplace campaign is an organized, company-sponsored fundraising drive where employees are asked to contribute to the community.

Some goals of the workforce campaign are to:

- Educate employees and organizations about community issues – connecting them with their community and allowing them to make informed decisions.
- Maximize the impact of giving – one gift can support multiple programs.
- Make it easy for employees to give – through payroll deduction, a gift can be made over the course of a year.
- Ensure that community partners get the support they need, especially in these challenging times.
- Bring together employees in a fun, educational and inspiring way to help support the local community.

### Employee Giving

When an employee makes the decision to contribute through the workplace campaign, there are several ways for them to do so.

For locally managed campaigns, employees may give through payroll deduction, check, cash, or credit card. This can be done either through a paper pledge form or, if your organization is eligible, through a United Way epledge site.

For regional and national campaigns managed by a corporate office or headquarters, United Way staff and your organization's point of contact for the campaign will confirm giving options.

After employees contribute, your organization or its corporate office provides either paper pledge forms or an electronic file detailing gift amounts and donor names. Without payroll data, United Way is unable to thank your employees for their gift or provide tax receipts.

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## **Pledge Remittance**

Remittance of payroll deductions and corporate gifts can be made on a weekly, monthly, quarterly, or annual basis. United Way of the Dutchess-Orange Region will track the collection of funds for employee and corporate giving.

## **Designated Giving and Processing Fees**

Prior to remitting donations to designated agencies, United Way must certify that the agency is eligible to receive a charitable gift. Designated agencies are required to be a government agency or both a 501(c)3 and Patriot Act Compliant as eligible to receive contributions. If United Way is unable to certify a designated agency, United Way will send a letter to the donor requesting additional information. If no response is received from the donor within 30 days, a second letter will be sent giving the donor an additional 30 days to respond. If no response is received from the donor to the second letter, the gift will be redirected to United Way's community fund, supporting community needs in Education, Income, and Health.

United Way will distribute funds to designated agencies quarterly. United Way withholds a designation fee of 15% on all gifts. These restrictions are necessary to ensure processing costs are covered.

## **Roles and Responsibilities**

### **For United Way**

1. Assist with planning and execution of the campaign.
2. Process payroll deduction, cash, check, and credit card transactions.
3. Provide your company with monthly, quarterly, or annual pledge bill reminders.
4. Mail tax receipts to respective donors by January 31 for one-time gifts of \$250 or more made by donors by December 31 of the previous year.
5. Receive customer service and donor inquiry calls at [donorservices@uwdor.org](mailto:donorservices@uwdor.org).

### **For your company**

1. Communicate campaign to employees including kick-off and follow-up.
2. Allow employees to pledge using either paper pledge forms or an online tool.
3. Collect paper pledge forms and check/cash donations. Submit pledges received to the Employee Campaign Manager or mail checks only to:

United Way of the Dutchess-Orange Region  
PO Box 481  
Fishkill, New York 12524

4. Provide payroll payment to United Way and (when possible) a donation detail file on payroll deduction donors.
5. Send donor questions to United Way.

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United Way looks forward to our partnership, because no one can do it alone.  
Together, there is little we cannot do. That's what it means to LIVE UNITED.