

## UNITED WAY OF GREATER PHILADELPHIA AND SOUTHERN NEW JERSEY PAYOUT POLICY

United Way of Greater Philadelphia and Southern New Jersey (“**UWGPSNJ**”) processes many local campaigns and several Out of Area “national” campaigns. We encourage you to log in to our agency online reporting website (details below) to obtain your Donor List. Many donors expect to be acknowledged for their gifts to your organization, and it is essential that this is done in a timely manner. In the past, many agencies were unaware of gifts to their organization until they received actual payment. In fact, you can access your donor list year-round; do not wait until you receive payments.

This document outlines our general policies relating to Campaign Results, Payouts, and other related information. *Please share this document with all the appropriate staff in your organization, including Campaign, Finance, Processing, and Donor Services.*

### Highlights

- Donor lists are available at [www.UnitedforImpact.org/reporting](http://www.UnitedforImpact.org/reporting):
  - Enter your **User ID**= «ORGACCOUNTNUMBER»
  - Enter your **Password** = (enter your organization’s five-digit zip code.)
  - If you need additional information, please contact [donorservices@unitedforimpact.org](mailto:donorservices@unitedforimpact.org)
- UWGPSNJ retains 12.5% administrative fees.
- Designations are paid directly to your organization based on received dollars.
- Electronic Disbursements will begin in December.
- Payment detail reports are available at the website listed above.
- All Billing is done by UWGPSNJ. **Do not bill** donors associated with these accounts.
- All Receipting for tax purposes is done by UWGPSNJ. Please do not send tax receipts to these donors. Additionally, do not include any IRS wording on any communications (including “thank you” letters) with these donors.

### Processing and Fundraising Fees

- The combined fees for the Fall Campaign are 12.5%. This consists of 4.6% for general and administrative costs, and 7.9% for fundraising costs. Fees will be applied against the gross pledge and deducted up front on all payments made directly to your organization.

### Collections and Payments

- UWGPSNJ 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. **Please do not send collection notices to any donors or companies.**
- The distribution of funds collected is based on amounts received. Because we set a minimum dollar amount for payment disbursements; your organization may not receive a distribution each payment cycle.
  - Note: regarding designations paid by payroll deduction withholdings: For most companies, UWGPSNJ applies payroll received amounts in lump sum rather than applying payments to individual donors. There are only a handful of companies where we contractually process donor detail for every payroll payment we receive. As such, payroll payments are spread proportionately across ALL payroll donors for that company. The actual payments by donor may vary from the amount deducted

from their pay because of the overall uncollectible payroll payment rate for that company being applied to ALL payroll donors at that company.

- UWGPSNJ will pay organizations via ACH transfer on a quarterly basis beginning in December. Beginning in July 2022, UWGPSNJ no longer paid organizations by manual check. All payments will be made by ACH. Electronic payouts honor the donor's desire to get their donation to you as quickly as possible. See the Reporting section below for login instructions.

## **Reporting**

- To access our agency online reporting website, please go to [www.UnitedforImpact.org/reporting](http://www.UnitedforImpact.org/reporting).
  - Once you log on, please take time to review all the resources that are available to you including:
    - answers to our most Frequently Asked Questions (FAQ),
    - the current payout schedule,
    - the ability to update contact and banking information online.
- **Donor Confirmations** are sent by UWGPSNJ as the campaign is processed. We suggest that you issue acknowledgements also. You have access to the donor listing reports via our online reporting website. (See login instructions below). Please acknowledge the full amount of the donor's pledge without deducting costs or fees. **Do not include any language in your correspondence that suggests the donor's gift is tax deductible.** Gifts credited to a donor for Acknowledgment purposes may be reportable to a different entity; only UWGPSNJ can determine if a donor's gift is tax deductible.
- **Donor List (Acknowledgement to Agencies Report)** - This report lists all donors that designated to your agency. 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 acknowledgment. This report can be generated at any time and is available in .PDF and .CSV formats.
- **Donor Tax Receipts** are the responsibility of UWGPSNJ. **Do not issue any receipts to these donors or include verbiage in any correspondence that suggests the donor's gift is tax deductible.** Gifts credited to a donor for Acknowledgment purposes may be reportable to a different entity; only UWGPSNJ can determine if a donor's gift is tax deductible.
- **Payment Details** reports (Payee by Organization Reports) are available online upon receipt of your payments from us. These reports will provide you with the names of the donors included with each payment. You should not use this report to acknowledge your donors' gifts; instead, you should use the Acknowledgement to Agencies report to thank your donors as stated previously.

## **Diplomacy with Donors**

- Agencies should not encourage donors to give to them directly instead of via the United Way Campaign. Be prepared to respond to a donor who may wonder why he should give through UW and pay the 12.5% fees when he can give directly to his agency. Donors could give directly to the agency without paying the 12.5%, but the reality is that without the opportunity to donate provided by the UW Campaign, the convenience of payroll deduction, and the efficiency of making one pledge to help many, very few WOULD donate on their own. Agencies would be on their own to do all their own fundraising efforts and typically do not have the capacity to reach donors like United Way campaigns without increasing their own administrative costs significantly.

If you have any questions or concerns, please contact us at [donorservices@unitedforimpact.org](mailto:donorservices@unitedforimpact.org).

Thank You!

August 2024