



Frequently Asked Questions For Donor Options Eligible Agencies (Local Campaign)

If you have additional questions, please contact Nia Sargeant via email (donorchoice@uwrochester.org) or by phone, (585) 242-6527.

What is the role of my 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. To ensure that your agency receives communications from United Way, please keep us informed of changes to the contact information.

What is the United Way of Greater Rochester portal? Upon acceptance, your agency will receive an email with a link to United Way of Greater Rochester's portal site. The portal is a secure website for your agency to get information about the campaign and to run donor and payment information reports. Donor reports are available throughout the year on the portal. United Way will notify the donor choice contact when payment reports are ready. *Please use the donor reports to thank your donors.*

A donor told me that he/she designated a gift to our organization but his/her name is not on the donor list; why not? Your donor may have requested to be anonymous and therefore does not appear on the listing.

A donor who lives out of the area told me that he/she designated his/her gift to our organization but his/her name is not on our donor list; why not? Donors may designate to agencies in our area, but they do not always pass through our United Way. Many times these designations are paid directly to the agencies from an out-of-the-area United Way.

How often will my agency's donor options contact be contacted? The donor choice contact should expect to receive emails from United Way every time a payment is made to your organization.

Will my agency need to re-certify? Yes. Biennially, United Way asks agencies to submit re-certification paperwork. Agencies failing to re-certify will be removed as donor options agencies. To expedite this process, we initiate re-certification through email. If we do not receive a response via email, the re-certification paperwork will be mailed to your agency. The next re-certification will begin in the Fall of 2021. Also, all agencies are continuously monitored for 501(c)(3) eligibility, and will be contacted if their status changes.



When does United Way of Greater Rochester's campaign run? Our workplace campaigns begin in the fall of each year and end in June of the next year. For example, the 2021 campaign began in fall 2020 and ends in June 2021.

Can my organization use the United Way logo in our materials? Yes. See the agency communication guidelines on the United Way of Greater Rochester website for more information. Also, you can include your donor options number in your materials.

How is my organization paid for the designations made by donors throughout the campaign? Designation payments for each year's campaign are paid monthly on the first of the month after campaign end, starting September 1 through March 1. If designations are \$1,000 or less, then a net lump sum payment is made September 1st. This information can also be found on the agency portal site.

What fees are associated with participating in donor options? There are two fees associated with participating in the donor options program at the United Way of Greater Rochester:

- Agencies receiving designated gifts through the campaign agree to pay 8% from the total amount raised to help defer fundraising costs, the cost of soliciting and processing the designation.
- There is also a pledge loss fee, which is a reserve for pledges that will not be collected from donors. The amount is based on historical loss including an average of the past three years actual pledge loss.

Whom should I contact at United Way with questions about payments? Questions should be directed to Darlene Miller via email (darlene.miller@uwrochester.org) or phone, (585) 242-6534.

Please store this document and a copy of your application in a secure place.