

# 2018-2019 Planning Form

Mail to: 215 W. 6<sup>th</sup> St., Dubuque, IA 52001

Email to: admin@DBQUnitedWay.org



United Way of  
Dubuque Area Tri-States

Campaign Start Date: \_\_\_\_\_ Campaign End Date: \_\_\_\_\_

1. Company Name: \_\_\_\_\_

2. Recognition Name (if different from #1): \_\_\_\_\_

3. Corporate Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ URL: \_\_\_\_\_

4. # of Employees - FULL-TIME: \_\_\_\_\_ and PART-TIME: \_\_\_\_\_

5. Local "CEO" – Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Assistant's Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

6. Employee Campaign Coordinator (ECC) – Name: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

7. Alternate Employee Campaign Coordinator (ECC) – Name: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

8. Payroll Contact – Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

9. Employee Giving Options (The following giving options will be offered:)

Cash -  Payroll Deduction -  Check -  Stock -  Payroll Deduction -  Direct Bill -  Credit Card –

Other \_\_\_\_\_

10. Special Event(s): Will the campaign include any special events?  Yes -  No

Kickoff Date: \_\_\_\_\_ Other Event Dates/Descriptions: \_\_\_\_\_

11. Corporate Gift (if N/A skip to #13):

100% to local United Way  We match employee gifts (attach Corporate Match policy)

(Continued ...)

**12. Corporate Gift Payment Information and Schedule:** (Please reference campaign year on payment remittance)

**Payment Frequency:**  Once (preferred)  Monthly  Quarterly  Other \_\_\_\_\_

**Corporate Gift Payment will be:**

Paid in Full  Paid in Full and consolidated with the first payroll deduction remittance

Paid incrementally along with the employee payroll deduction

**Payment** – 1<sup>st</sup> Expected Remittance Date: \_\_\_\_\_

**13. Employee Payroll Deduction Information and Schedule:**

**Number of Pay Periods** per Year \_\_\_\_\_ (if multiple, list others here: \_\_\_\_\_)

**Payment Frequency** to local United Way:  Once  Bi-Weekly  15<sup>th</sup> & 31<sup>st</sup> of Month  Monthly  Quarterly

**Deductions** will START on (Pay Period Start Date) \_\_\_\_\_ (Pay Period End Date) \_\_\_\_\_

**Payment** – 1<sup>st</sup> Expected Remittance Date: \_\_\_\_\_

**14. Pledge Forms and Campaign Materials**

Will you use UW pledge forms?  Yes  No

If NO, sample pledge form or screen shot of online pledge form attached)

Will pledge forms be (check all that apply):

Submitted in total  Accompanied by documentation (i.e. spreadsheet)  Separated by work location

**15. Miscellaneous (Check all that apply)**

We plan to solicit our retirees.

We would like to be included in the New Hire program (United Way will provide our company with pledge forms and new hire brochures as needed throughout the year)

We would like to request a speaker for this year's company campaign kickoff.

**16. Pledge Payment and Remittance Information**

We request reminders be sent:  Once  Bi-Weekly  15<sup>th</sup> & 31<sup>st</sup> of Month  Monthly  Quarterly

ACH (Automatic Clearing House)/EFT (Electronic Funds Transfer) If new, please contact local finance director.

Check (Check payable to: United Way of Dubuque Area Tri-States, 215 W 6<sup>th</sup> St, Dubuque, IA 52001)

**17. Does campaign involve multiple work locations?**

Yes (attach list with location name, address and zip code)

Will all locations be represented on ONE check?  Yes  No

No