

# **Caterpillar Panama and Monterrey United Way Appeal (CEUWA)**

## **Frequently Asked Questions – 2013-2014**

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### **GENERAL QUESTIONS**

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#### **1. What is the Caterpillar Employees United Way Appeal (CEUWA)?**

It is a workplace campaign that raises funds on behalf of community United Ways. All Caterpillar employee campaigns are considered CEUWA no matter where they are located or how the campaign runs.

#### **2. Why does Caterpillar have a corporate campaign?**

The corporation and its employees are supportive of United Way, but Caterpillar realized that the various campaigns held by each agency were starting to overwhelm employees at work. In the early 1950s, Caterpillar created a corporate campaign that would be conducted internally for employees through the United Way, rather than invite each of the hundreds of agencies to solicit the employees individually.

#### **3. Who pays the administrative cost for Caterpillar to coordinate the CEUWA?**

Caterpillar pays 100% of all expenses associated with CEUWA (supplies, administrative costs, etc.). Every penny of employee contributions goes to the participating United Ways.

#### **4. How much of the total employee contribution to CEUWA go to the local United Ways?**

100% of all employee contributions to CEUWA go directly to the United Ways.

#### **5. How much of my contribution to the United Way is distributed to local agency/programs?**

This varies with each local United Way. The majority of the funds will go directly to agency/program, but United Ways also have administrative costs. For instance, the Heart of Illinois United Way (HOIUW) sends 89 cents per dollar to agencies. The rest is used to offset administrative costs.

#### **6. Who determines which United Ways are part of the CEUWA?**

The online pledging system allows all United Way to participate in the campaign based on the country you reside. However it is the local United Way's responsibility to update their system with the appropriate funded programs and impact areas to allow donors the ability to designate to a particular agency.

#### **7. Who decides how much of the money raised by facility campaigns goes to their local United Way?**

All employee contributions go back to the local United Way(s) or agencies based on your home zip code or otherwise specified location if you chose. CEUWA's role in the campaign is to raise funds for the local United Way(s). It is the responsibility of the United Way(s) receiving the funds to allocate the monetary contributions as needed.

#### **8. Are employees expected to contribute to the CEUWA?**

Caterpillar realizes not all employees will participate in CEUWA and employees are not required to contribute to CEUWA. However, employees are encouraged to contribute to the United Way or agency of their choice. CEUWA serves as a vehicle to support many agencies with one contribution. In addition, funds raised by employees are eligible to be matched by the Caterpillar Foundation dollar for dollar.

#### **9. Is there a corporate policy written about the CEUWA?**

There is a corporate policy that specifically deals with "solicitations" and it states that internal solicitations are NOT allowed. However, CEUWA is an exception to that policy. Caterpillar is able to solicit each employee on company time with company resources using a Caterpillar Employee online pledging process. The CEUWA campaign is strictly solicited through an online form during the annual internal campaign. For more information on the Corporate Solicitation Policy, please see your local HR representative or HR Manager.

### **ABOUT PLEDGES/CONTRIBUTIONS**

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#### **10. How do I pledge online?**

You will receive your cue to pledge online through a series of communications from your communications team. To pledge online you can visit [www.caterpillar.com/unitedway](http://www.caterpillar.com/unitedway) for the pledge link and more information. Select the appropriate pledge link. You will then need to register and complete the pledge process.

#### **11. When are contributions effective?**

All contributions made to CEUWA are effective as of the employees first pay period in the 2014 calendar year (pay period 1)(e.g. In August 2012, Jim pledges \$500 each month. Actual deductions from Jim's pay check will not be taken out until January 2013). Employees can access their pay stub at Cat @work to verify that the payroll contribution is correct. **If it is incorrect or a change needs to be made – please go to Question 14 and 15.** Please note: If you have chosen to participate with a one-time-only contribution, it will be set-up for the first pay period and will be taken the first pay period of the 2014 year. If you have chosen to donate a percentage of your salary, your donation will be based on your salary as of January 2013 and may fluctuate based on your salary throughout the year.

**12. Is there a minimum payroll contribution?**

There is a minimum payroll contribution of \$1.00 per pay period directed to a United Way.

**13. Tell me more about payroll contribution.**

The payroll contribution is "*per paid period*," therefore; you will not need to specify the annual amount, rather just the amount that will be contributed *each pay period*. Contributions are derived from base pay and do not include vacation pay, night bonus or overtime.

**14. What if I do not fill out my online form?**

We strongly recommend that you fill out the online form so that the Caterpillar Foundation can accurately match and measure contributions.

**15. How do I correct, change or cancel (stop) my payroll contribution if I pledged online?**

If you pledge online, you are able to make changes using the online pledging site until the campaign closes. If you have any changes after the close of the campaign and prior to December 31, 2012 please email the [CEUWA\\_cat@cat.com](mailto:CEUWA_cat@cat.com) inbox with the changes needed. Employees should watch their first pay stub in January to make sure the deduction is correct. If the wrong amount was entered or there is a change needed after January 1, 2013, employees must contact their local HR or payroll team to make any corrections.

**16. I did not receive an e-mail or message allowing me to pledge online. What should I do?**

If you did not receive an initial pledge email or reminder emails please contact your [local United Way coordinator](#). You can also visit [www.caterpillar.com/unitedway](http://www.caterpillar.com/unitedway) for more information.

**17. If I pledge online and am pulled away from my desk, will the system "time out" or log me out?**

Yes, the site will time out and you will need to log back in if this happens. If the site sits idle for 5 minutes it will time out due to amount of personal information on the site. You may need to reopen the page using the link in your email or visit [www.caterpillar.com/unitedway](http://www.caterpillar.com/unitedway).

**18. My Leave of Absence coincided with my United Way Campaign, how could I still pledge?**

You can access the pledging details at [www.caterpillar.com/unitedway](http://www.caterpillar.com/unitedway); however pledging will only be accessible during the campaign timeframe. If you are unable to make your pledge via the pledging site during the campaign you will not be able to participate in the program. You are welcome to still contribute to the United Way via cash/check etc. but it will not be eligible to be included in the company's overall results and receive the Foundation match.

**19. Can I contribute by check or cash?**

CEUWA does not accept checks or cash. The only form of contribution to CEUWA is through Payroll Deduction. If an employee wants to write a check, the employee must write it directly to the charity of

his/her choice and mail it separately from the campaign (like any other personal contribution). However, the Caterpillar Foundation will only match payroll deduction contributions.

**20. Will my supervisor, boss or leader be able to know if I contributed or how much I contributed?**

No, the only person with access to United Way pledging detail is the manager of the online pledging system. Caterpillar management does not have access to online pledging and any personal information including whether or not an employee contributed and how much. Employee names are only provided to local coordinators at the end of the campaign if the employee chooses to be recognized for their leadership level contribution.

**21. The online system asks me to input my salary in order to donate a percentage amount, why?**

This information is used for the purpose of calculating your donation to provide **estimated** campaign reporting. Your information will be kept private and will not be shared. Actual salary information is calculated by payroll prior to your deduction beginning January 2013. As always, the decision to donate is a personal one, so we sincerely thank you for your consideration.

**22. An online system error occurs when I input my salary, what do I do?**

You will need to enter your salary without any commas or decimals. If you are still receiving an error please contact your local coordinator.

**23. Are contributions tax-deductible? If so, how will employee know how much they gave?**

Donations are tax-deductible. Contributions that are made via payroll deduction, employees can access their pay stub at Cat @work to verify that the payroll contribution is correct. CEUWA does not issue receipts and cannot look up the amount at the end of the year.

**24. Who do I contact if I am having problems with the online pledging system?**

Please contact your local coordinator first. If they cannot provide you the answer you may email the [CEUWA\\_CAT@cat.com](mailto:CEUWA_CAT@cat.com) inbox for assistance.

**25. Will the Caterpillar Foundation match my United Way contribution?**

Yes, the Foundation will match employee contributions dollar for dollar.

**26. I have more questions, whom do I contact?**

Contact your [local United Way coordinator](#).

**COORDINATOR QUESTIONS**

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**27. How do I view my facility results during and after the campaign?**

Local coordinator can view facility results by going to the Connection Community. This report will be updated on a weekly basis (posted Friday's during the campaign). However, a facility total does not mean that is the total dollars your local United Way will be receiving so please do not communicate results with your United Ways. Keep in mind employees have the option to designate funds to any United Ways in the U.S. not just your area.

### **28. How do I view my business unit results during the campaign?**

Business Unit results will be available via the dashboard in the online pledging site. To access the dashboard log in to the online pledging site and select the Dashboard tab on the left. The dashboard allows you to **click on** the Group President and Vice President name and view BU details down to department level. Due to confidentiality more detailed information cannot be provided lower than the Department Head level.

### **29. How do I know what my facility or business unit's participation percentage is during the campaign?**

To view your business unit participation go to the dashboard and look at the percentage of donors. Do not look at the percentage of respondents. Facility information will be available on the Connections Community every Friday during the campaign. Please see definitions below:

**Population:** Number of employees tied to that facility or Business Unit

**Respondents:** Number of employee who took some sort of action in the system. For example: chose not to pledge or chose to make a contribution

**Non-Respondents:** Number of employee who have not taken action in the system.

**Donors:** Number of employees who made a donation **(This is your participation rate)**

**Pledged:** Dollars pledged within that facility of Business Unit

### **30. When will the final employee campaign totals be communicated?**

Employee campaign totals will be available and communicated in early October. However, final totals including retiree contributions will not be available until late October 2012.

### **31. What are the Leadership Levels and Builders Circle?**

In most communities, donors giving \$1000 or more are considered Leadership Givers. Please check with your local United Way about Leadership Giving in your community. **Caterpillar Builders Circle Program** recognizes employee donors, who give \$1000 or more or 1% of their salary, as Leadership Givers within their Business Unit and choose not to remain anonymous. The United Way Tocqueville Society recognizes individuals making gifts of \$10,000 and more annually to their local United Way. This giving level was founded 25 years ago in order to deepen the understanding, commitment and support of United Way's most generous and community minded investors.