



Caterpillar Retiree United Way Appeal (CEUWA) Frequently Asked Questions – 2023-2024

Updated 07/17/2023

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GENERAL QUESTIONS

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1. What is the Caterpillar Employee United Way Appeal?

The Caterpillar Employee United Way Appeal is Caterpillar's annual workplace campaign that raises funds on behalf of local United Ways. All U.S. Caterpillar employee campaigns are considered part of the CEUWA no matter where they are located or how the campaign runs.

2. What is the 2023 campaign timeframe?

The 2023-2024 Caterpillar Employee United Way Appeal (CEUWA) will begin on Monday, August 21, 2023 and end on Friday, September 15, 2023.

3. Why does Caterpillar have a corporate campaign?

Caterpillar has supported United Way for more than 70 years; United Way's mission and work aligns with Our Values in Action and programs we support—health, welfare and economic stability of communities in which we work and live. Individually, employees are encouraged to actively engage in activities that contribute to the betterment of society through volunteering time and talents or investing monetary resources in worthwhile community projects and initiatives.

Caterpillar chose United Way as our only solicitation to employees for a reason—the strength of the United Way process ensures only the most efficient and effective non-profits are funded. In addition, Caterpillar recognized the value local United Ways provide to local communities and believes in the strength of their process as the best investment of employee and company dollars.

4. Who pays the administrative cost for Caterpillar to coordinate the CEUWA?

Caterpillar pays 100 percent of all expenses associated with CEUWA (supplies, administrative costs, etc.). Every penny of employee contributions goes to the participating United Way organizations. This means there are no administrative expenses paid on employee dollars when they are directed to your local United Way and/or designated United Way partner agency.

5. Who determines which United Ways are part of the campaign?

The online pledging system allows all United Ways in the U.S. to participate in the campaign. 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 funded partner agency. If their system is not updated at the time of our campaign, employees will not be able to locate funded United Way agencies in their area.

6. How much of the total of employee and retiree contributions to the CEUWA go to the local United Way?

Local United Ways and United Way-funded partner agencies receive 100 percent of all employee contributions to the CEUWA.

7. Are retirees expected to contribute to the United Way campaign?

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

8. How do I sign up to receive annual Retiree United Way Appeal reminder emails to ensure I don't miss the campaign window?

Please visit www.caterpillar.com/unitedway and select the 'click here' link designated for Caterpillar retirees and employees retiring within the next calendar year section to fill out a quick survey that asks for your name and personal email address to be added to our United Way campaign email list. This will ensure you continue to receive United Way pledge reminder emails and helpful pledging instructions each year from the Caterpillar Foundation.

9. Is there a corporate policy written about the United Way campaign?

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

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10. How do I pledge online?

The online pledging is open for retirees from August 21 – September 15, 2023. You can visit www.caterpillar.com/unitedway for more information on where and how to pledge. The online pledging link will be available on the website when the campaign opens on August 21, 2023.

11. When are contributions effective?

This depends on your payment selection in the pledging process. Immediate payments can be made, or you can defer payments to begin on a particular date.

12. Is there a minimum contribution?

There is a minimum payroll contribution of \$1 directed to your local United Way or another United Way of your choosing. The minimum contribution amount of \$1 applies to both recurring and one-time-only contributions.

If you've chosen to designate to a United Way-funded agency, the minimum contribution is \$25 per agency. Please note that this \$25 designation minimum is a typical amount, and local United Way organizations and their partner agencies have the ability to set this amount higher.

13. How do I correct, change or cancel (stop) my pledge?

When 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, please email the CEUWA_cat@cat.com inbox with the changes needed.

14. I need my HR ID to register—where can I find that?

Please call 309-675-1475 or email CEUWA_Cat@cat.com to request your HR ID Number (formerly PeopleSoft ID).

15. 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 by going to www.caterpillar.com/unitedway and sign into the pledging link again.

16. Can I withhold funds or make my contributions exempt from a specific agency?

The CEUWA raises funds on behalf of the local United Way(s). The local United Way(s) then determines how much total money goes to each agency. Caterpillar has confidence in United Way’s dollar allocation process that ensures only efficient and effective programs are funded based on the unique needs in each community. However, an employee does have the right to exempt partner agencies from their pledge in the negative designation section of the online pledging site.

17. Am I able to designate my contributions to specific agencies?

Yes, designation options are available to all employees and will initially *default to the United Way that aligns to your home zip code*. However, if you wish to designate to another United Way or United Way-funded partner agency, you can search and select to designate your pledge to any United Way or United Way-funded partner agency in the United States. Agencies must be funded United Way member agencies to be available for designation. We do not allow designations to other 501(c)3 nonprofit organizations as part of the United Way campaign.

18. What forms of payment are accepted?

The online system is for tracking purposes and to be eligible for the Foundation match. You have the option to select cash/check, credit/debit card, or stock/donor-advised fund as your form of payment. The credit/debit card option allows the option to deduct from your credit card immediately. Cash/check and stock/donor-advised fund payments must be fulfilled separately by sending payment directly to the United Way around the date you indicate in your pledge. You will also have the option to pay using multiple forms of payment.

19. The United Way is asking for my personal information—what will they do with that information?

The United Way may use this information as a recognition tool and a way to keep in contact with their donors. Providing your personal information is optional. If you wish to remain anonymous internally and externally, please select the anonymous option in the online pledging system.

20. Are contributions tax-deductible? If so, how will retirees know how much they gave?

Donations are tax-deductible. If you provide an email address in the contact information section of the system you will receive notification confirming the amount pledged. However, because this is a pledge, please use a copy of your form of payment for tax purposes.

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

Please email the CEUWA_CAT@cat.com inbox for assistance.

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22. How many designations can I make?

You can designate to as many United Ways and funded partner agencies as you would like. There is no limit. However, the minimum contribution to a United Way general fund is \$1, and the minimum contribution to a United Way partner agency is \$25 per partner agency.

23. Can I designate funds to a specific organization that is not listed in the online pledging system?

“Write-in” options are not allowed. You may only designate to a United Way or a United Way-funded partner agency through the CEUWA. Other charitable organizations may qualify for matching funds through the Caterpillar Foundation Matching Gifts Program. Please visit www.caterpillar.com/matching-gifts or contact Erika Kempf at Matching_Gifts@cat.com or (309) 675-1475 for questions regarding the Matching Gifts Program.

24. What happens if I do not designate to a specific agency or I only designate a part of my contribution?

If you do not specify a designation, the entire contribution or the remainder of your contribution will be distributed with the overall campaign contributions to your local home zip code United Way, ensuring all of the worthy organizations receive assistance.

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

Yes, the Caterpillar Foundation will match employee contributions dollar for dollar with no maximum amount (Example: If Caterpillar employee pledges total \$5.6 million, the Foundation will match \$5.6 million.). For contributions designated to United Way-funded partner agencies, the Foundation match will be sent to the local United Way that funds that partner agency, not to the designated agency. For example, if an employee gave \$100 to their local Red Cross, the Foundation match is given to the general fund of the United Way that is aligned to that local Red Cross. This is because Caterpillar recognizes the value local United Ways provide to communities and believe in the strength of their process, which determines the greatest need in that area and the best investment of company dollars.

The Caterpillar Foundation supports many community and worldwide efforts such as disaster relief, United Way, local charitable functions and individual employee contributions to qualified organizations. The Caterpillar Foundation does not support groups or projects that discriminate or restrict services based on factors of race, color, sex (including pregnancy), age, disability, veteran status, religion, national origin, ancestry, sexual orientation, gender identity, marital status, domestic partner status, genetic information or citizenship status.

The Caterpillar Foundation will negatively designate our match when it is matching designations to organizations that discriminate or for projects that do not reflect the general principles of Caterpillar's Code of Conduct and Our Values in Action. “Negatively designate” means that the local United Way cannot use Foundation dollars to allocate to the organization that discriminates.

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

Please email the CEUWA_CAT@cat.com inbox for further assistance.