

FINANCE PROCEDURES



PLEDGE FORMS

- Original copies must be returned to United Way.
- Encourage employees to print legibly.
- All pledge forms must be signed and dated.
- There is a \$25 pledge minimum for employees to be billed.
 - *Pledges less than \$100 will be billed semi-annually.
 - Invoices will be mailed beginning in January unless otherwise noted.
 - If donors would like their pledge form and payment to be processed before December 31, the form needs to be returned prior to December 1.
 - A home address is required for employees requesting a direct bill.
- There is a \$25 pledge minimum to pay by credit card.
 - For paper pledge donors, United Way will contact them at the phone number provided by the donor, or donors can call United Way at 336-378-6608.
 - For e-Pledge donors, credit card billing will begin in January unless otherwise noted.
 - If donors would like their form to be processed and credit card charged before December 31, the form needs to be returned prior to December 1.
 - A billing address is required for employees paying by credit card.
- Donors who wish to donate stock must note it on the pledge form and they will be contacted by United Way.
- Checks must be made out to **United Way of Greater Greensboro.**

DESIGNATIONS

- The pledge form allows for two separate designations.
- There is a \$100 minimum for focus area designations.
- There is a \$100 minimum for any member agency or unaffiliated organization.
 - A complete name and valid address must be provided for outside or unaffiliated organizations.
 - The organization must be a valid 501(c)(3) tax-exempt organization.
- Designations cannot be made to programs within an agency.
- United Way assesses a 12% fundraising and management fee from each designation to any outside or unaffiliated organization. This fee is not assessed from designations to Member Agencies.

The image shows a 'United Way Pledge Form' with the following sections:

- 1 My Contact Information:** Fields for name (First, Middle, Last, Suffix), Home Address, City/State/Zip, Phone, and Employer.
- 2 My United Way Investment:** Options for 'EASY PAYROLL DEDUCTION' (with sub-options for pay periods and amounts) and 'PAY NOW' (with sub-options for cash, check, or credit card). It also includes a 'PAY LATER' section with billing frequency options (Monthly, Quarterly, Semi-annually, Once) and a start date.
- 3 My Signature:** A line for the donor's signature and a date field.
- 4 My Engagement Group(s):** A section titled 'I'm Ready to be Engaged!' with logos for YL, AAL, and Women's Leadership. It lists options for 'Young Leaders' and 'Women's Leadership' with their respective annual contribution amounts.
- Optional:** A section for 'FOCUS my gift in the most effective way to put children, adults and families on a path toward self-sufficiency.' with checkboxes for: 'Advance education and training success', 'Reach financial stability and independence', 'Lead a healthy lifestyle', and 'Access basic resources such as food and shelter'. It also includes a checkbox to designate to another nonprofit agency.
- Footer:** A disclaimer: 'No gifts or services are provided in exchange for this contribution. Please keep a copy of this form for your records. We will also need a copy of your pay stub, W-2 or other employer document showing the amount withheld and paid to a charitable organization. Contact your tax advisor for more information. Financial information about this organization and a copy of its license are available from the State Solicitor Licensing Branch at 919-887-2714 or 888-438-4888 for NC Residents.'

FINANCE PROCEDURES



EMPLOYEE CAMPAIGN REPORT (ECR)

- The ECR details employee campaign totals by type of donation and will match the pledge forms contained in the envelope.
- If more than one envelope is used to gather forms, an ECR should be included for each envelope.
- The ECR should be completed and signed by the ECM.
- Please mark the ECR as **PARTIAL** or **FINAL**.

Employee Campaign Report (ECR)
United Way of Greater Greensboro
1500 Yanceyville St.
PO Box 14998
Greensboro, NC 27405-6998

Company Name: _____
Account Number: _____

Payroll Deductions # Givers: _____ Tot \$ _____	Cash # Givers: _____ Tot \$ _____
Direct Bill # Givers: _____ Tot \$ _____	Checks # Givers: _____ Tot \$ _____
Stock Pledges # Givers: _____ Tot \$ _____	Special Events Tot Cash: \$ _____
Credit Card # Givers: _____ Tot \$ _____	Special Events Tot Checks: \$ _____

Total Dollars = _____ Report Status
 Partial
 Final

Print Name: _____
 Signature: _____
 Title: _____ Phone #: _____
 Company: _____

Notes: Must have a signature to process
 Do NOT include totals from previous envelopes
 Please do NOT include Corporate pledges in this total

REPORT ENVELOPE

- The ECM must enter the dollar amount that is included in the envelope and must sign and seal the envelope.
- The sealed envelope must be received by United Way and will only be opened by the finance staff.
- The ECM should notify their account manager if the envelope is **PARTIAL** or **FINAL**.

LIVE UNITED REPORT ENVELOPE

United Way
United Way of Greater Greensboro
1500 Yanceyville Street • Greensboro NC 27405
Telephone 336-378-6600 • Fax 336-378-6654
UnitedWay650.org

TO: EMPLOYEE CAMPAIGN MANAGERS (ECM) THIS ENVELOPE IS FOR USE IN SUBMITTING YOUR CAMPAIGN REPORT. PLEASE READ ALL INSTRUCTIONS CAREFULLY AND COMPLETE ALL REPORTS. WE DEPEND ON YOU FOR COMPLETE AND ACCURATE INFORMATION. THANK YOU!	SUMMARY EMPLOYEE GIFT \$ _____ CORPORATE GIFT \$ _____ TOTAL \$ _____ YOUR SIGNATURE: X _____
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COMPANY NAME _____ ACCOUNT # _____
 ADDRESS _____ CITY _____ STATE _____ ZIP _____
 ECM NAME _____ PHONE _____
 ECM Email _____

PLEASE INCLUDE (IF APPLICABLE) IN THIS ENVELOPE:

- EMPLOYEE CAMPAIGN REPORT (ECR) - Please fill out completely, clip and return
- COPY OF EMPLOYEE LISTING SHEETS or email your spreadsheet to employee-listing@unitedwaygo.org
- Copy of all completed and signed PLEDGE CARDS
- CASH AND CHECKS (paper-clipped to the PLEDGE CARDS)
- Signed CORPORATE PLEDGE CARD
- Company Information PAYROLL SHEET

COMPANIES USING ePledge, PLEASE INCLUDE:

- CASH AND CHECKS with copy of cash report
- Copy of TRANSACTION REPORT

**** USE SPECIAL EVENT ENVELOPE FOR CHECKS/CASH NOT RECORDED THROUGH E-PLEDGE**

PLEASE KEEP FOR YOUR RECORDS:

- Copy of EMPLOYEE CAMPAIGN REPORT (ECR)
- Copy of EMPLOYEE LISTING SHEET or your spreadsheet listing
- Copy of all payroll deduction PLEDGE CARDS sent to your office

UNITED WAY OFFICE USE ONLY

United Way Representative & Date: _____ (Please Print)
 Billing Status: PARTIAL FINAL (EXCLUDES CORPORATE GIFT)
 Fax Page Processor & Date: _____
 Envelope #: _____
 Audit/Issue & Date: _____
 Dated to House Date: _____
 To Be Scanned Date: _____

SEAL ENVELOPE -- PLEASE DO NOT MAIL -- A UNITED WAY REPRESENTATIVE WILL PICK IT UP

COMPANY INFORMATION

- The Company Information Form is needed to ensure that payroll and corporate gifts are accurately processed.
- If United Way already has this information on file, there is no need to submit another form. However, please do submit a new form if any contact information has changed.

Account Number: _____ Campaign Team: _____
 Account Name: _____ Number of employees: _____

Please help us maintain our records by providing the following information
 Name of Chief Executive Officer/President/Managing Partner

 General Mailing Address for Business

Both corporate and payroll will be billed at a minimum of once a year.

Section 1: Corporate billing
 Job: _____
 Address: _____
 City/State/Zip: _____
 Billing preference: _____
 Email address: _____
 Phone for contact: _____

Section 2: Payroll billing
 Job: _____
 Address: _____
 City/State/Zip: _____
 Billing preference: _____
 Email address: _____
 Phone for contact: _____

Section 3: Third party payments (If you have a third party that will send out payments to United Way for payroll and/or corporate billing please provide information below)
 Name of processor: _____
 Address: _____
 City/State/Zip: _____
 Contact Name: _____
 Contact E-Mail: _____
 Contact Phone: _____

Section 4: Employees designate dollars - does your company pay these designation dollars direct to the agency or will you send the money to United Way?

Section 5: Employee payroll deduction information
 Employee deductions will begin in (date) _____ and end (date) _____
 Payroll deductions will begin (date) _____ and end (date) _____
 Payments will be issued (3-monthly, monthly, other) _____
 Will payment include employee listing _____

If you have any questions regarding this form, please contact Dawn Taylor in the finance department at 336-378-6612 or email dawn.taylor@unitedwaygo.org

FINANCE PROCEDURES



WORKPLACE SPECIAL EVENT ENVELOPE

- All special event funds should be collected separately from campaign funds and collected for submission in the special event envelope provided by United Way of Greater Greensboro.
- Please do NOT include any pledge forms in the Special Event envelope.

LIVE UNITED
United Way

SPECIAL EVENTS
United Way of Greater Greensboro
1500 Yanceyville Street • Greensboro NC 27405
Telephone 336-378-6600 • Fax 336-378-6611
UnitedWayGSO.org

TO: EMPLOYEE CAMPAIGN MANAGERS (ECM) THIS ENVELOPE IS FOR USE IN SUBMITTING SPECIAL EVENT ACTIVITIES ONLY. ALL SPECIAL EVENTS SHOULD BE COMBINED. CAREFULLY COMPLETE FRONT OF ENVELOPE. WE DEPEND ON YOU FOR COMPLETE AND ACCURATE INFORMATION. THANK YOU.	SUMMARY SPECIAL EVENTS \$ _____ YOUR SIGNATURE: X _____
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COMPANY NAME _____	ACCOUNT # _____
ADDRESS _____	CITY _____ STATE _____ ZIP _____
ECM NAME _____	PHONE _____

PLEASE INCLUDE IN THIS ENVELOPE:
 CASH AND CHECKS
NO PLEDGE CARDS SHOULD BE INCLUDED IN THIS ENVELOPE. ONLY SPECIAL EVENT FUNDS SHOULD BE SUBMITTED.

PLEASE KEEP FOR YOUR RECORDS:
 Copy of EMPLOYEE CAMPAIGN REPORT (ECR)

UNITED WAY OFFICE USE ONLY
United Way Representative (Please Print) _____
Electronic File Name _____
Face Page Processor _____
Envelope # _____
Auditor Name & Date _____

SEAL ENVELOPE -- PLEASE DO NOT MAIL -- A UNITED WAY REPRESENTATIVE WILL PICK IT UP

EMPLOYEE LISTING SHEET

- List the employees whose pledge forms are included in the envelope.
- A paper copy of the Employee listings should be included and returned in the campaign envelope.
- Employee listings may be submitted electronically by emailing a spreadsheet to Employee.Listing.Sheet@unitedwaygso.org. To get an electronic copy of the Employee Listing Sheet, go to www.unitedwaygso.org, click Campaign Toolkit, and you can download or print.

Please print name, amount contributed and method of payment for each employee. (Use all columns except last)

EMPLOYEE NO.	ACCOUNT NUMBER:	DEPARTMENT:	PERSON COMPLETING THIS REPORT:	Employee Name	Equal Payment Deduction Pledge	Special Giving Pledge	Cash Contribution	Cash Contribution	Cash Contribution	Total Pledge Contribution
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
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25										
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27										
28										
29										
30										
31										
PAGE TOTALS										
GRAND TOTALS (FINAL PAGE ONLY)										

Please make copy for your files.

TAX LETTERS

- United Way provides Tax Letters at the end of January for paid donations of \$250 or more received prior to December 31.
- United Way does NOT provide Tax Letters for payroll deductions.