

FINANCE PROCEDURES



United Way of Greater Greensboro

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.

2018 DONATION FORM

1 MY CONTACT INFORMATION

First Name Middle Last Suffix
 Home Address City/State/Zip
 Phone Employer
 Personal Email Required for Car Giveaway

2 MY UNITED WAY INVESTMENT

FAST PAYROLL REDUCTION
 A. Number of pay periods B. Amount per period
 TOTAL ANNUAL PLEDGE (MAX)
 FAST PAY NOW/BILL ME
 Attach check made payable to United Way
 Bill me at the email address listed above
 Choose a billing preference: Monthly, Quarterly, Semi-annually, Once
 TOTAL ANNUAL PLEDGE Billing begins January 1
 I am already retired I plan to retire on
 I want to learn more about Planned Giving

3 MY SIGNATURE

FOCUS my gift is the most effective way to put children, adults and families on a path toward self-sufficiency
 OR CHOOSE ONE area focused on helping others (\$100 pledge minimum)
 Achieve education and character success Access food and other basic needs
 Lead a healthy lifestyle Reach financial stability and independence

Front

THE POWER OF GIVING

\$200 = 25 PEOPLE GET A MEAL DELIVERED TO THEIR HOME

\$500 = 31 PRESCHOOLERS GIVEN BOOKS THAT PROMOTE READING

\$1,000 = A YEAR OF IN-HOME SERVICES FOR AN AGING ADULT

\$2,500 = 20 PEOPLE LEARN SKILLS TO LAND A JOB

\$5,000 = 10 KIDS RECEIVE ACADEMIC TUTORING FOR A YEAR

CHECK OUT OUR OUTCOMES: UnitedWayGSD.org/Outcomes

back

FINANCE PROCEDURES



United Way of Greater Greensboro

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.**

United Way of Greater Greensboro Employee Campaign Report (ECR)

Company Name: _____
Account Number: _____

Payroll Deductions # Givers: _____ Total \$ _____	Cash # Givers: _____ Total \$ _____
Direct Bill # Givers: _____ Total \$ _____	Checks # Givers: _____ Total \$ _____
Other giving # Givers: _____ Total \$ _____	Special Events Cash: \$ _____ Checks: \$ _____
Credit Card # Givers: _____ Total \$ _____	Special Event Total: \$ _____ <small>*These dollars can be put into the Special Event Envelope</small>

Total for Employee Giving \$ _____
Total for Special Events \$ _____
Envelope Total \$ _____

Please mark this sheet to notify us if this envelope is partial or final:
Partial
Final

Print Name: _____
Signature: _____
Phone # _____ Date _____

Notes: Must have a signature to process. Do NOT include totals from previous envelopes or corporate gift unless actual payment is included for corporate gift in this envelope.

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 of Greater Greensboro
1500 Yanceyville Street • Greensboro NC 27405
Telephone 336-338-6600 • Fax 336-338-6655
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: _____

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, sign and return
- COPY OF EMPLOYEE LISTING SHEETS or email your spreadsheet to reporting@unitedway.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

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's Name (Please Print)
REPORT STATUS: PARTIAL FINAL (EXCLUDES CORPORATE GIFT)
Four Page Process & Date _____
Envelope # _____
Auditor Name & Date _____
Detailed by Name & Date _____
To Be Returned 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 Year: 2017
Account Name: _____ Number of Employees: _____

Please help us maintain our records by providing the following information:
Name of CEO / President / Top Local Executive: _____
Mailing Address: _____
Both corporate and payroll will be billed at a minimum of twice a year

SECTION 1: Corporate Billing
Attn: Address: _____
City / State / Zip: _____
Billing Preference: Mail _____ E-mail _____
E-mail Address: _____
Phone for Contact: _____

SECTION 2: Payroll Billing
Attn: Address: _____
City / State / Zip: _____
Billing Preference: Mail _____ E-mail _____
E-mail Address: _____
Phone for Contact: _____

SECTION 3: Third Party Payment (if you have a third party—i.e. Cybersource, Frontstream, another United Way, etc.—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 directly to the agency or will you send the money to United Way? _____

SECTION 5: Employee Payroll Deduction Information
Employee deductions will begin on (Date): _____
Payroll deductions will be disbursed: Bi-Weekly _____ Bi-Monthly _____
Monthly _____ Quarterly _____

If you have any questions, please contact Samantha Lyons-Kittrell in the Finance Department at 336-378-6600 or e-mail LWGS30.Finance@unitedway.org

FINANCE PROCEDURES



United Way of Greater Greensboro

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 or pledge payments in the Special Event envelope.**

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 _____

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.**

Date: _____
Page ____ of ____

Employee Listing Sheet for United Way Greater Greensboro Campaign
(You may download an electronic version at <http://www.unitedwaygso.org/campaign-toolkit>)

Company: _____ Account #: _____

Name of Person Completing: _____

Employee Full Name	Total Pledge	Employee Payroll Deductions	Direct Bill (must have pledge form with current info)	Cash Gift	Check Gift	Credit Card
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
Totals						

Make copies for your records for future reference.
Grand Total: \$ _____

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.