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.**
  - Payment reminders 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 or valid email 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 send a payment reminder to donor so that they may call to have their card processed or use online system.
  - For e-Pledge donors, credit cards will be charged within at least 10 business days of receipt of pledge if the date is prior to January 1.
  - An 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.**
- **We do not accept postdated checks.**

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.

TAX LETTERS
- Per IRS, United Way is required to provide Tax Letters for donations of $250.00 or more paid by December 31. Letters will be mailed by January 31.
- United Way does **NOT** provide Tax Letters for payroll deductions as we do not know the specified amount that was paid by December 31, and this amount should be provided on donors’ W2.
FINANCE PROCEDURES

CAMPAIGN ENVELOPE

- Enter the dollar amount that is included inside the envelope, as reported on the Envelope Summary Report below.
- Check the boxes to ensure everything is included.
- Sign and seal the envelope.
- The sealed envelope must be received by United Way and will only be opened by the finance staff.
- Your account manager can provide your account number.
- No not include special event monies in this envelope.

ENVELOPE SUMMARY REPORT (ESR)

- This report details employee campaign totals by type of donation and will match the pledge forms contained in the envelope.
- You may complete this form from your computer and download for submission. This will allow easier data entry and total form for you. Go to https://www.unitedwaygso.org/campaign-toolkit/#other-resources, and download this form.
- List the employees whose pledge forms are included in the envelope.
- A copy of the employee listings should be included and returned with each campaign envelope submitted.
- The ESR should be completed and signed by the ECM.
- Please mark the ESR as PARTIAL or FINAL.
- If you are a company that does not submit pledge cards or any cash/check employee donations, this may be submitted electronically by emailing a spreadsheet to Employee.Listing.Sheet@unitedwaygso.org.

ORGANIZATION FINANCIAL CONTACT FORM

- This form is needed to ensure that payroll and corporate pledge reminders and tax receipts are sent to the correct contact.
- If United Way already has the correct information on file, there is no need to submit another form. However, please do submit a new form if any contact information has changed.
FINANCE PROCEDURES

WORKPLACE SPECIAL EVENT ENVELOPE
- All special event funds should be collected separately from employees’ personal pledges/donations 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 CASH RECONCILIATION REPORT
- This report totals the amount of cash and checks in the envelope.
- United Way of Greater Greensboro only needs to know the total amounts and not what each specific fundraiser totaled.
- If more than one envelope is used to gather special events, this report should be included for each envelope.
- Do not include paper pledge forms or pledge payments on this report.