

Finance procedures

PLEDGE FORMS

- Original copies must be returned to United Way.
- Print legibly and complete all required fields.
- A fillable PDF of the paper pledge form is available, if preferred
- All pledge forms, paper or electronic, 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 pledge form 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 donors 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, regardless of designation.**
- **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 19% 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.



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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 if you are submitting a campaign envelope. This will allow easier data entry and total form for you. Go to <https://www.unitedwaygso.org/campaign-toolkit/#other-resources> to download this form.
- **If you are submitting your pledge files electronically, please submit this form with each file submission as an attachment in the email. If you are submitting a spreadsheet, this form is not necessary.**
- List the employees whose pledge forms are included in the envelope/file submission.
- 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 UWGSO.Finance@unitedwaygso.org to ensure that payroll and corporate pledge reminders and tax receipts are sent to the correct contact.**

Organization Financial Contact Form

- This form is needed to ensure that payroll 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.



United Way
of Greater Greensboro

United Way
of Greater Greensboro

CAMPAIGN ENVELOPE

United Way of Greater Greensboro
1500 Yanceville Street, Greensboro, NC 27405
Telephone: 336-379-4500 Fax: 336-379-6111
UnitedWayGSO.org

EMPLOYEE CAMPAIGN MANAGER (ECM):

Use this envelope for submitting any pledge-related reports, payments, or pledges ONLY. Use a Special Event Envelope for those monies.
Read all instructions below and provide complete information related to your workplace campaign.
WE DEPEND ON YOU FOR COMPLETE AND ACCURATE INFORMATION.

COMPANY NAME: _____ ACCOUNT # _____

SUMMARY OF ENVELOPE

Employee Gifts/Pledges: \$ _____

Corporate Gift: \$ _____ This is a matching gift

Total Enveloped: \$ _____

ECM Signature: _____

PLEASE SUBMIT FOR UNITED WAY'S RECORDS IN THIS ENVELOPE:

COPY OF ENVELOPE SUMMARY REPORT (if applicable)

ORIGINAL PLEDGE CARDS

CASH AND CHECKS (Paper-clipped to the donor's PLEDGE CARD if one has been completed)

ePLEDGE TRANSACTION REPORT FOR CONTENTS AND FINAL REPORT (if applicable)

BONDS CORPORATE PLEDGE CARD (if applicable)

ORGANIZATION FINANCIAL CONTACT SHEET

PLEASE KEEP FOR YOUR RECORDS:

COPY OF ENVELOPE SUMMARY REPORT

COPY OF ALL PLEDGE CARDS FOR PAYROLL DEDUCTIONS

UNITED WAY OFFICE USE ONLY (Please Print)

Use Staff Pledge & Date: _____ ePledge

Donor Name: _____

Please Add Finance & Date: _____

Completed Finance & Date: _____

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

ENVELOPE SUMMARY REPORT

United Way
of Greater Greensboro

COMPANY NAME: _____ ACCOUNT # _____

NOTES:

- This report is for the transactions related to this envelope ONLY. Do not combine totals from previous submissions.
- This form is best used if you download and enter information into it for accurate calculation. Visit <https://www.unitedwaygso.org/campaign-toolkit> to download.
- If you are an ePledge campaign, please make sure you run the reports out of ePledge for receipts received. This is not a substitute for ePledge reports.
- A pledge card is required if a donor is designating to an agency.

Order	Employee Payroll	Direct Bill	Cash	Check	
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
Totals		\$	\$	\$	\$
Envelope Total Receipts		\$			

This campaign is FINAL PARTIAL Please sign that you have reviewed information related to this report. PLEASE RETAIN A COPY FOR YOUR RECORDS.

Signature: _____ Date: _____

ORGANIZATION FINANCIAL CONTACT INFORMATION

Help us maintain accurate records by providing the following information:

Company Name: _____ Account Number: _____

Campaign Year: _____ Number of Employees: _____

Employee payroll giving & billing contact

Contact Name: _____

Phone: _____

E-mail: _____

Billing Address: _____

City / State / Zip: _____

Billing Preference: Mail E-mail

Payroll payment reminder preference:

Monthly Quarterly Annually

Not at all (payments will automatically be sent)

Reminder start date: ____/____/____

(Default date is 1/1 of the new year after campaign is complete)

Frequency of Employee Payroll payments:

Monthly Quarterly Annually Paid in full at campaign close

If you have any questions, please contact
Samantha Lyons-Kittel in the Finance Department at
336-379-4500 or e-mail UWGSO.Finance@unitedwaygso.org

United Way
of Greater Greensboro

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.



United Way
of Greater Greensboro

SPECIAL EVENTS

United Way of Greater Greensboro
1500 Yanceyville Street, Greensboro, NC 27405
Telephone 336-378-6400 | Fax 336-378-6611
UnitedWayGSO.org

DO NOT PUT ANY EMPLOYEE PLEDGES OR MONEY RELATED TO EMPLOYEE PLEDGES IN THIS ENVELOPE FOR ACCURATE RECORDING.

COMPANY NAME _____ ACCOUNT # _____

TOTAL ENCLOSED \$ _____ (Cash and Checks)

SIGNATURE: _____ DATE _____

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

For Internal Use:

RD Representative (Please Print) _____

Pick up date _____

Finance Department _____

Envelope # _____

Auditor Name (Please Print) _____

Date _____

SPECIAL EVENTS CASH RECONCILIATION REPORT

Report Special Event receipts on this form **ONLY**.
This form is also PDF fillable to add your totals for you.

COMPANY NAME _____

ACCOUNT # _____

SPECIAL EVENTS SUMMARY (this envelope only)

Cash	\$ _____
Checks	\$ _____
Total	\$ _____

SIGNATURE: _____ DATE _____

PHONE NUMBER: _____

NOTES:

- Submit new report with each Special Event submission. If you have multiple events, you may download more copies at unitedwaygso.org/campaign-toolkit.
- Do NOT include totals from previous envelopes.
- Do NOT include any pledge payments or pledges on this form.
- Must have a signature to process.