



Learn how to assist employees with the pledge form and what to submit when closing your campaign.

Download forms at unitedwaygso.org/toolkits-resources. Contact your UWGG rep for physical forms/envelopes.

Pledge form

- A fillable PDF is available on the Toolkit.
- Ask donors to print clearly and complete all required fields.
- All paper and electronic pledge forms must be signed and dated.
- Payroll pledges: include the number of and amount per pay period; multiply them for the total annual pledge.
- Bill Me pledges: Pledge minimum: \$25. Pledges under \$100 are billed semi-annually. Payment reminders begin in January unless noted otherwise. To process the pledge and payment by Dec. 31, return the form by Dec. 1. A home or valid email address is required.
- Paper clip cash/checks to paper pledge forms. Do not staple or tape.
- Make checks payable to United Way of Greater Greensboro, regardless of designation. Postdated checks are not accepted.
- Stock: Donor should note it on the pledge form; UWGG will contact them.
- Return original pledge forms to UWGG; scans and fillable PDFs are also accepted, see below for email submission. Keep copies for your records.

Designations

- Minimum designation: \$100, including focus areas.
- Designations to a UWGG Strategic Partner or other nonprofit:
 - The organization must be a valid 501(c)(3).
 - Include the agency's full name and valid address.
- Designations cannot be made to specific agency programs.
- A 19% fundraising and management fee applies to designations to outside or unaffiliated organizations, but not to funded Strategic Partners.

Tax Letters

- Per IRS rules, United Way must provide tax letters for donations of \$250 or more paid by December 31. Letters are mailed by January 31.
- United Way does NOT provide tax letters for payroll deductions as the amount paid by December 31 is unknown. Donors should instead refer to their W-2 or paystub.

Organization Contact Information Form

- Complete so payroll reminders and tax receipts go to the correct contact.
- No new form is needed unless your contact information has changed.

Submitting via email

- If your company has no physical pledge cards (only scanned or fillable PDF pledge forms) and no cash/check donations, email the scans/PDFs or a share a file location to UWGSO.Finance@unitedwaygso.org.
- Attach the Organization Contact Information Form, if applicable.

The front of the pledge form includes sections for:

- MY CONTACT INFORMATION:** Fields for name, address, phone, and email.
- FOR PUBLIC RECOGNITION:** Options for public recognition and a checkbox for 'Consider my gift with my spouse/partner'.
- MY UNITED WAY INVESTMENT:** Fields for amount per pay period, frequency, and total annual pledge.
- TO GIVE TO ANOTHER STRATEGIC PARTNER:** Fields for agency name and address.
- FOCUS MY GIFT:** A section for selecting focus areas like Youth Opportunity, Financial Security, Healthy Community, and Integration Support.
- MY SIGNATURE:** A line for the donor's signature and date.

Front

The back of the pledge form features:

- BE GREENSBORO'S POVERTY DISRUPTOR:** A large graphic with text about disrupting poverty.
- WIN A PRIZE!** A section about winning a prize by pledging.
- UNITED WAY OF GREATER GREENSBORO:** Contact information for the organization.

Back

The Organization Contact Information Form includes:

- COMPANY NAME:** A field for the company name.
- ADDRESS:** Fields for street address, city, state, and zip.
- CAMPAIGN YEAR:** A field for the campaign year.
- NUMBER OF EMPLOYEES:** A field for the number of employees.
- EMPLOYEE PAYROLL BILLING CONTACT:** Fields for name, contact preference (email, phone, mail), and phone number.
- BILLING ADDRESS:** A field for the billing address.
- BILLING PREFERENCE:** A checkbox for 'Bill Me'.
- PAYROLL PAYMENT REMINDER FREQUENCY:** A section for selecting payment frequency (Monthly, Quarterly, Semi-annually, Annually).
- REMAINDER START DATE:** A field for the remainder start date.
- FREQUENCY OF EMPLOYEE PAYROLL PAYMENTS:** A section for selecting payment frequency (Monthly, Quarterly, Semi-annually, Annually).
- EXPECT PAYMENTS FROM:** A section for selecting payment method (Check, EFT, Credit Card, Other).

Cash/Check Summary Report

- ONLY record cash and check donations from paper pledge forms.
- This form is best used if you download from unitedwaygso.org/toolkits-resources and type in for accurate calculation.
- Submit a new Cash/Check Summary Report with each Campaign Envelope. Do not combine totals from previous submissions.

Campaign Envelope

1. Collect all pledge forms.
2. Complete the front of the envelope:
 - Company name and account number. If applicable, include the school or department name. Your UWGG rep can provide account number.
 - Total employee and corporate gifts, if applicable.
 - Your signature and contact information.
3. Place all items in the Campaign Envelope.
4. Review the checklist to confirm all required items are included.
5. Seal the envelope. **NOTE:** Unsigned or unsealed envelopes will not be accepted.

Do not include special event funds in this envelope.

Workplace Special Event Envelope

- Special event funds can be submitted to UWGG at any time and throughout the year.
- All special event funds should be collected/submitted separately from employee pledge forms or pledge payments.
- If you need a reinforced envelope, UWGG can provide one. Otherwise, a regular envelope can be submitted.
- Include all coins, cash, or checks and the Special Events Reconciliation Report in the envelope.

Special Events Reconciliation Report

- This report totals the amount of cash and checks in the envelope.
- UWGG only needs the total amount and not what each specific event raised.
- If you hold events throughout the year, include a new report with each special event envelope submission.
- Do not include paper pledge forms or pledge payments on this report.

UNITED WAY
Greensboro

EMPLOYEE CASH/CHECK SUMMARY REPORT

Company Name: _____ Account #: _____

NOTES:

- ONLY record cash and check donations from paper pledge forms. Include original pledge forms.
- ePledge campaigns should use the Cash/Check Report out of ePledge for payments received.
- This form is best used if you download from unitedwaygso.org/toolkits-resources and type in for accurate calculation.
- Submit a new Cash/Check Summary Report with each envelope. Cash/Checks listed below must be related to this envelope ONLY. Do not combine totals from previous submissions.

Donor Name	Cash Amt	Check Amt
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
Subtotal		
ENVELOPE TOTAL		

Please retain a copy for your records.

Signature: _____ Date: _____

UNITED WAY
Greater Greensboro

CAMPAIGN ENVELOPE

1500 Yanceyville Street, Greensboro, NC 27405
336-378-6600 | UnitedWayGSO.org

TO EMPLOYEE CAMPAIGN MANAGER (ECM):
Only use this envelope for submitting Employee or Corporate related pledge forms, reports, or payments.
Read all instructions below and provide complete information related to your workplace campaign.

Company Name: _____ Account #: _____

SUMMARY OF ENCLOSED

Employee Pledges/Gifts \$ _____
Corporate Pledge/Gift \$ _____ ☐ This is a matching gift
TOTAL Enclosed \$ _____

ECM Signature: _____

RETAIN A COPY FOR YOUR RECORDS:

- ☐ 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 reports (if applicable)
- ☐ Signed corporate pledge card (if applicable)
- ☐ Organization financial control sheet (if you have changes to contact)

UNITED WAY OFFICE USE ONLY (Please Print):

UWGG Staff Name & Date: _____
Finance Department: _____ ☐ Office
Preparation Name & Date: _____
Completed By Name & Date: _____

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

UNITED WAY
Greater Greensboro

SPECIAL EVENTS ENVELOPE

1500 Yanceyville Street, Greensboro, NC 27405
336-378-6600 | UnitedWayGSO.org

Do not put any employee pledge forms or money related to employee pledges in this envelope.

Company Name: _____ Account #: _____

Total Enclosed \$ _____ (Cash and checks)

Signature: _____

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

UNITED WAY OFFICE USE ONLY (Please Print):

UWGG Staff Name & Date: _____
Finance Department: _____
Envelope #: _____ Date: _____
Auditor Name (Please Print): _____

UNITED WAY
Greater Greensboro

SPECIAL EVENTS RECONCILIATION REPORT

Company Name: _____ Account #: _____

NOTES:

- ONLY report Special Event receipts on this form.
- This form is setup to add totals for you, when downloaded from unitedwaygso.org/campaigns-software.
- If you have multiple events throughout the year, submit new report with each Special Event submission. Do not include totals from previous envelopes.
- Do not include any pledge payments or pledges on this form.

SPECIAL EVENTS SUMMARY

Cash \$ _____
Checks \$ _____
TOTAL \$ _____

Signature: _____ Date: _____

CONTACT YOUR UWGG REPRESENTATIVE WHEN READY FOR PICKUP

Sealed envelopes must be received by UWGG and can only be opened by UWGG Finance staff.

ePledge campaigns: Refer to the campaign closing instructions in e-Administration.