
LIVE UNITED

COMPLETING YOUR CAMPAIGN ENVELOPE

United Way
of Greater St. Joseph



After your employee campaign is complete, you will need to turn your results in to United Way. Please submit your results in a Campaign Report Envelope, which can be obtained from United Way. A United Way representative will also pick up your completed envelope when you are ready. Once your envelope reaches United Way, it will be audited for completeness and accuracy. You may be contacted by a member of our staff with questions regarding your envelope. Many of these questions can be avoided by submitting a spreadsheet with giving details in addition to pledge cards. (Spreadsheets are most helpful when they include employee name, giving level, amount of gift per pay period, estimated amount of gift per year, email address and home address.)

Below is a sample envelope, as well as some hints to assist you in completing the Campaign Report Envelope.



United Way
of Greater St. Joseph
stjosephunitedway.org
118 South 5th Street
St. Joseph, MO 64501
(816) 364-2381 Fax (816) 364-6030

Account # _____
 Organization Name _____
 Address _____
 City _____ State _____ ZIP _____
 Chief Executive Officer _____

1. **TOTAL NUMBER OF EMPLOYEES** _____
(Please be sure to include.)

Fair Share donors _____
 Fair Share Plus donors _____
 Super Giver donors _____
 Crystal Circle donors _____
 Other donors _____
TOTAL number of donors _____

2. **Contribution Summary**

	Number Contributing	Amount Contributed/ Pledged	Paid Now	Balance Due
CORPORATE CONTRIBUTION				
EMPLOYEE CONTRIBUTIONS				
Cash/Checks (paid in full)				
Bill Direct				
Payroll Deduction				
TOTAL Employee Contributions				
SPECIAL EVENTS				
Total (Corporate + Employee + Special Event)				

3. **Billing Instructions**

Company Contribution
Send bill () Yes () No If YES, bill:

Annually _____
Beginning Date

Quarterly _____
Beginning Date

Other, specify _____
Beginning Date

Employee Contributions
Send bill () Yes () No If YES, bill:

Monthly _____
Beginning Date

Quarterly _____
Beginning Date

Other, specify _____
Beginning Date

Do you expect to submit additional reports? () Yes () No

Signature _____ Position _____ Date _____
(Coordinator or CEO/Packers with payroll deductions must have an authorizing signature.)

1. Header Section: (upper right hand corner)

- ⇒ Please make sure that the *Organization Name, Address, City, State, Zip* and *CEO* lines are completed with up-to-date information.
- ⇒ The *Total Number of Employees* line should represent the total number of employees that are employed by your organization.
- ⇒ Please provide a breakdown of the number of Fair Share, Fair Share Plus, Super Giver, Crystal Circle, and other donors. On the *Other donors* line, please include all donors who make a one-time gift, ask to be billed, or sign up to have a specific dollar amount deducted from their paycheck. Please ensure that the *Total number of donors* matches the *Number Contributing* column in the *Contributions Summary* section.

2. Contribution Summary Section:

- ⇒ The *Corporate Contribution* line is provided for you to write down the amount of the corporate gift, how much is being *Paid Now* (payment should be inside the report envelope), and the *Balance Due*. Corporate gifts can be paid at any time, and United Way can bill a company for a corporate contribution on a monthly, quarterly or annual billing cycle.
- ⇒ The *Employee Contributions* section is used to provide the details of your employee campaign totals. For each type of gift/pledge (*Cash/ Checks, Bill Direct* or *Payroll Deduction*), it is important that you complete the number of employees contributing each type of gift.

Cash/Checks- This line should include fully-paid gifts only. The *Amount Contributed/Pledged* should equal the amount *Paid Now* for that row.

Bill Direct- This line should be used for employees who wish to be billed directly for their contribution. Employees can choose to be billed monthly, quarterly, semi-annually or annually. This line should also be used for any employees who wish to utilize ACH (monthly auto-debit from a checking account). In some cases, an employee will partially pay a pledge and ask for the balance to be billed—the amount of the total pledge should be listed on the Bill Direct line, showing that a portion has been *Paid Now*.

Contribution Summary Section (continued)

Payroll Deduction—This line should be used for employees who are requesting that their contribution be deducted from their paychecks. The *Amount Pledged* and the *Balance Due* should be equal. No Payroll Deduction pledges should be paid at the time the envelope is submitted to United Way. United Way will provide billing reminders for your organization's payroll pledges on a monthly, quarterly or annual basis, as indicated in the *Billing Instructions* section. Be aware that your billing reminders will always reflect the total amount pledged, minus what has already been remitted. That amount may not equal the actual dollars you have deducted from paychecks because of employee turn-over and this is okay. United Way anticipates that some pledges will be deemed uncollectible due to turnover and that sometimes overpayment may occur due to new hire solicitation and/or pay raises that occur throughout the year.

TOTAL Employee Contributions— This line should be used to summarize the information contained in the Cash/Checks, Bill Direct and Payroll Deduction rows.

- ⇒ The *Special Events* line is the area where you list proceeds from the sale of jeans days, revenue earned through an auction or cookout, etc. that do not need to be attached to a specific employee. Generally, special event money is paid in full at the time of the event.
- ⇒ The line labeled *Total* is for you to summarize the corporate, employee, and special event totals.

3. Billing Instructions Section:

- ⇒ Under *Company Contribution* please indicate when you would like United Way to send a bill for the corporate gift.
- ⇒ Under *Employee Contributions* please indicate when you would like United Way to send billing statements for the pledges you collect through payroll.
- ⇒ Please be sure to indicate whether or not you expect to submit additional pledges. Many organizations submit a report envelope when the majority of pledge cards are returned, and submit an additional report envelope when the "straggler" cards are returned.
- ⇒ Please be sure to sign and date your report envelope.

A Few More Important Tips:

- ⇒ Please provide United Way with any spreadsheets that you use to total the pledge cards; electronic formats are most appreciated. If you do not use a spreadsheet, please consider calculating the amount of each gift and writing it on the upper right hand corner of the pledge card. This helps United Way maintain accurate records and be able to accurately answer questions when donors call in.
- ⇒ If donors choose to give a dollar amount per paycheck, please indicate the number of pay periods in 2018. Generally, most companies operate with 12, 24, 26 or 52 pay periods per year.
- ⇒ Please calculate the amount of each gift that is designated. Sometimes, a donor chooses to be a Super Giver and to designate their gift to a specific agency– United Way does not know the amount of the designation unless it is calculated and submitted with the rest of the campaign results.
- ⇒ If you choose to submit multiple report envelopes throughout the campaign, please be sure that each donor is only submitted once. We would hate to count a single pledge multiple times.
- ⇒ Don't forget to include the "United Way Copy" of each pledge card. The "Payroll Copy" should be retained by your organization's payroll department, and the "Donor Copy" should be kept by the donor for their records.
- ⇒ If you offer Continuous Giving, please submit a report of donors and the amount of the pledge to enable United Way to maintain accurate records.

If you have any questions when completing your Campaign Report Envelope, please contact Renita Neville at (364-2381 or renita.neville@stjosephunitedway.org).