

**COMPLETING YOUR
UNITED WAY
CAMPAIGN ENVELOPE**



UNITED WAY
Greater St. Joseph

After your employee campaign is complete and payroll has tallied results, you will need to turn your results in to United Way. Please submit your results in a Campaign Envelope, which will be provided by United Way. This envelope will be picked up by a United Way representative when ready, along with any extra unneeded materials. 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 forms. *(Spreadsheets are most helpful when they include employee name, giving level, amount of gift per pay period, estimated amount per gift per year, email address and home address.)*

Below is a sample envelope followed by steps to assist you in completing the Campaign Envelope.

LIVE UNITED



**United Way
of Greater St. Joseph**

stjosephunitedway.org

118 South 5th Street

St. Joseph, MO 64501

(816) 364-2381 Fax (816) 364-6030

Account # _____ CY: _____

Organization Name _____

TOTAL NUMBER OF EMPLOYEES _____

TOTAL NUMBER OF DONORS _____

Number of Pay Periods _____

Number of Crystal Circle Donors _____

1.

Contribution Summary

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

2.

Billing Instructions

h. Corporate Contribution

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

☐ Annually _____
Beginning Date

☐ Quarterly _____
Beginning Date

☐ Other, specify _____
Beginning Date

i. Employee Contributions

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

☐ Monthly _____
Beginning Date

☐ Quarterly _____
Beginning Date

☐ Other, specify _____
Beginning Date

3.

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

Signature _____ Position _____ Date _____

(Coordinator or CEO)-Packets with payroll deductions must have an authorizing signature.

1. Header Section: (*upper right hand corner*)

- Please make sure that the **Organization Name** is completed with up-to-date information.
- The **Total Number of Employees** line should represent the total headcount that is employed by your organization.
- Please ensure that the **Total Number of Donors** matches the total for the **Number Contributing** column in the **Contribution Summary** section.
- Please complete the **Number of Pay Periods** utilized for employees and the **Number of Crystal Circle Donors** (donors pledging ≥ \$1,000 annually).

2. Contribution Summary Section:

Corporate Contribution - This section is used to provide information about pledges being made by the company, including corporate gifts and/or matching corporate contributions.

a. Corporate Contribution

- Enter the total amount committed by the organization in the **Amount Contributed/Pledged** field.
- Enter how much is being **Paid Now** (payment should be inside the Campaign Envelope).
- Enter any outstanding unpaid amount in the **Balance Due** field (equal to the **Amount Contributed/Pledged** minus the **Paid Now** amount).
- Corporate contributions can be paid at any time through the end of the following calendar year.
- United Way can bill a company for a corporate contribution based on the indicated billing cycle. Directions for completing the **Billing Instructions** can be found on page 5.

Employee Contributions - This section is used to provide the details of your employee campaign totals. For each type of pledge (**Cash/Checks, Bill Direct or Payroll Deduction**), it is important that you complete the number of employees contributing and total annual pledge amounts for each type of pledge being submitted.

b. Cash/Checks (paid in full) - This line should include fully-paid gifts only and payment should be inside the Campaign Envelope.

- Enter the total number of donors pledging with this method in the **Number Contributing** column.
- Enter the total dollar amount pledged/paid with this method in the **Amount Contributed/Pledged** and **Paid Now** columns.
- For Cash/Check pledges the **Amount Contributed/Pledged** should equal the amount **Paid Now** and the **Balance Due** should be zero.

c. Bill Direct - This line should be used for employees who wish to be billed directly for their contribution, including those that wish to utilize ACH (monthly auto-debit from a checking/savings account).

- Employees can choose to be billed monthly, quarterly, semi-annually or annually.
- Enter the total number of donors pledging with this method in the **Number Contributing** column.

- Enter the total dollar amount pledged with this method in the ***Amount Contributed/Pledged*** column.
 - In some cases, an employee will partially pay a pledge and ask for the balance to be billed—in this case, the total amount of the pledge should be listed in the ***Amount Contributed/Pledged*** column, with any portion being paid recorded in the ***Paid Now*** column.
 - Enter the balance of any unpaid ***Bill Direct*** pledges in the ***Balance Due*** column.
- d. ***Payroll Deduction***—This line should be used for employees who are requesting that their contribution be deducted from their paychecks.
- Enter the total number of donors pledging with this method in the ***Number Contributing*** column.
 - Enter the total annual dollar amount pledged with this method in the ***Amount Contributed/Pledged*** column.
 - The ***Paid Now*** column should remain blank as no payments are made at the time the envelope is submitted for this method of pledging.
 - Enter the total annual dollar amount pledged with this method in the ***Balance Due*** column. This will be equal to the ***Amount Contributed/Pledged*** for this method of pledging.
 - United Way can provide billing reminders for your organization’s payroll pledges based on the indicated billing cycle in the ***Billing Instructions*** section on page 5.
 - 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, changes in hours and changes in pay rates. This is okay. United Way anticipates that some pledges will be deemed uncollectible due to various reasons and that sometimes “overpayment” may occur due to new hire solicitation and/or pay raises that occur throughout the year.
- e. ***TOTAL Employee Contributions***— This line should be used to summarize the information contained in the ***Cash/Checks, Bill Direct*** and ***Payroll Deduction*** rows.
- f. ***Special Events*** is the area where you list proceeds from the sale of jeans days, funds raised through an auction or cookout, etc. that are not attached to a specific employee/donor. Generally, special event money is paid in full at the time of the event.
- Enter the total dollar amount raised through the Special Event in the ***Amount Contributed/Pledged*** column.
 - Enter the total dollar amount collected through the Special Event in the ***Paid Now*** column. This should be the same amount entered in the ***Amount Contributed/Pledged*** column if the funds are being paid in full when the envelope is submitted.
- g. The ***Total*** row is used to summarize the amounts entered on the ***Corporate Contribution, Total Employee,*** and ***Special Events*** rows.

3. Billing Instructions Section:

h. *Corporate Contribution* is used to indicate preferences for billing invoices for the ***Corporate Contribution*** recorded in 2a.

- If you choose to be invoiced for the corporate contribution, choose when you would like invoicing to occur.
- Be sure to include the start date that you would like billing to begin.
- If this section is not completed billing will be handled in the same manner as the previous year. This may mean that invoices are not received at all.

i. *Employee Contributions* is used to indicate preferences for billing invoices for the ***Payroll Deduction Amount Contributed/Pledged*** recorded in 2d.

- Indicate whether you would like to receive an invoice for the employee payroll deduction contributions by checking ***Yes*** or ***No***.
- If you choose to be invoiced for the employee payroll deduction contributions, choose when you would like invoicing to occur.
- Be sure to include the start date that you would like billing to begin.
- If this section is not completed billing will be handled in the same manner as the previous year. This may mean that invoices are not received at all.
- Some organizations choose to be invoiced for the ***Corporate Contribution*** but not ***Payroll Deduction***, or vice versa.

J. Indicate whether you anticipate submitting additional pledges by checking ***Yes*** or ***No*** when asked “***Do you expect to submit additional reports***”. Many organizations submit a Campaign Envelope when the majority of pledge forms are returned, and submit an additional Campaign Envelope when the “straggler” forms are returned.

- Please add your ***Signature***, ***Position*** and ***Date*** when the Campaign Envelope is completed.

A Few More Important Tips:

- Please provide United Way with any spreadsheets that you use to total the pledge forms; 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 form. 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 your organization has annually in Section 1. Generally, most companies operate with 12, 24, 26 or 52 pay periods per year.
- It is important to include the amount of each gift that is designated. Sometimes, a donor chooses to designate their gift to a specific agency, however United Way does not know the amount of the designation unless it is submitted with the rest of the campaign results.
- If you choose to submit multiple Campaign 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 paper pledge form or a copy of the spreadsheet of pledges. The "Payroll Copy" of paper forms 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 all donors (both new and continuing) and the amount of each pledge to enable United Way to maintain accurate records.

If you have any questions when completing your Campaign Envelope, please contact

Renita Neville at

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