

HOW TO FILL OUT A CAMPAIGN REPORTING ENVELOPE

Please use a pen to fill out the pledge form. Please write clearly.

General

- All pledge forms, cash, and checks (including special event money) should be in this envelope.
- Every gift, including cash/checks (with the exception of special events), needs a pledge form.
- If there is more than one envelope, the reporting sheet on top should only detail the information inside of that envelope it is attached to.
- Yellow copies of pledge forms should be in this envelope. White copies should be with your payroll department. Donors keep pink copies.

Top Section

- Fill in company name and address, name of person submitting the envelope, date submitted, your number of employees, and number of pay periods at your company.
- Indicate report number of each envelope (i.e. 1 of 1, 2 of 4, etc). If there is more than one envelope, indicate that this is a partial report. If there is only one envelope, indicate that this is a full report.
- Fill in name and phone number of the contact United Way should call if we have a question about the envelope.

Bottom Section

- Number of Givers
 - Indicate how many donors there are for each type of gift.
 - At the bottom, add up the total number of donors in this envelope. (line 7)
- Total Amount This Report
 - Indicate the total dollar amount for each type of gift.
 - Corporate Gift (if applicable) – please indicate when your company would like to be billed.
 - Add up the total dollar amount in this envelope. (line 7)
 - At the bottom, add up the total dollar amount for all of your reporting envelopes combined. (line 8)
- Payments
 - Indicate the dollar amount physically included in this envelope for each type of gift.
 - Ex. Pledge forms will not have physical payments in the envelope, but cash and checks will have physical payments in the envelope.
 - At the bottom, add up the total dollar physically included in this envelope. (line 7)