Pledge Envelope Instructions

LIVE UNITED™ United Way
United Way
of the Greater Triangle

Now that you have completed your campaign, it's time to verify that the pledges are filled out correctly and complete your campaign pledge envelope. **Please contact United Way of the Greater Triangle by October 31 (if possible) to coordinate the return of all pledges and campaign materials.**

Pledge Form Verification

1. Collect pledge forms from employees who chose to make a pledge.
2. Verify that all information is on each pledge form. Pay particular attention to:
   - Contact info, if donor wishes to be acknowledged
   - Total Annual Gift
   - Check number, or all credit card information, if appropriate
   - Signature to authorize payroll deduction and credit card processing
3. Attach all payments of check and cash to their corresponding pledge forms with paper clips.
4. Separate the pledge forms by payment type and complete report envelopes (instructions below).
5. **Make copies of payroll pledge forms for your payroll dept**

Pledge Envelope Preparation

Please use the blue pledge envelope for credit card pledges, and the white pledge envelope for cash, check, stock and payroll deduction pledges.

Top Left Section – Company Information

1. Record the name of your company on line listed "Acct Name".
2. Record the any special instructions on line listed "Notes".
3. Record the amount of donations that were not designated to a specific agency on the line listed "GU $" or "CCF $". (undesignated or Live United Give United dollars)
4. Record your company's number of employees on line listed "# of Employees".

Bottom Left Section – Instruction Checklist

1. Follow instructions on Checklist.
2. Check off tasks with your initials under "CL".

Top Right Section – Pledge Detail

1. Record the number of gifts in envelope per payment type in column "# of Gifts".
2. Record the total amount pledged for each payment type in column "Total Amount of Gifts".
3. Record the total amount of payments that are enclosed in the envelope in the column listed as "Amount Enclosed". (This will only apply to cash and checks.)
4. Record total of each column in row "Total Employee Gifts".
5. Record the corporate gift amount and corporate payment enclosed in the envelope in the row "Corporate Gift". (Corporate pledge must be in writing on pledge card or company letterhead with authorized signature inside envelope.)
6. Record the amount of donations from Special Events that are enclosed in the envelope in the row listed "Special Events". (please put all special event dollars together inside envelope for easy processing)
7. Record total of "Total Employee Gifts", "Corporate Gift" and "Special Events" in row "Grand Total".

Bottom Right Section – Company Contact (Person filling out the envelope)

1. Print your name.
2. Sign your name.
3. Record the date you filled out the pledge envelope.
4. List your phone number for any questions.

Contact your UW Representative to schedule an envelope pickup. Please allow time for the UW Rep to audit the envelope with you upon pickup. This could take 15 minutes for 45 pledges or an hour+ for hundreds of pledges.