

COORDINATOR'S CHECKLIST FOR REPORTING RESULTS

Before Campaign	Notes	Activity Complete
Meet with the UW Representative to go over campaign process.		
Obtain the results envelope(s) & pledge cards from your Loaned Executive.	Go over the results envelope procedures with the UW Representative.	
Personalize pledge cards if applicable to your campaign.	Make sure the name is printed on each copy of the pledge card.	
United Way encourages companies to track results in excel, on-line pledging, etc. and to provide us with an electronic copy. Please see the section regarding Excel spreadsheets/electronic files Procedures if you will be submitting results electronically.	For questions please contact: Gerry Taylor at United Way (706) 543-5254 ext. 223 gerryktaylor@bellsouth.net	
If submitting campaign results by way of pledge cards, please see section regarding Pledge Card Procedures .	If you are submitting an excel spreadsheet or electronic file, submitting pledge cards is not necessary unless all information from the pledge cards is not reported on the excel spreadsheet.	
Visit our website for downloadable spreadsheet templates as well as other forms.	www.unitedwaynega.org	
If your company is using eWay , a separate set of instructions will be provided to you.		
During Campaign	Notes	Activity Complete
Make sure to keep any collections and confidential information secure. If you will be turning in partial results please refer to the Partial Results Procedures .	Keep up with matching dollars, copies for payroll, leadership pledges, what is turned in to date, and which cards you are waiting on as you go.	
Let your UW Representative know your progress as you collect pledges. Ask questions as needed or ask for more pledge cards & results envelopes before you need them.		
To prevent duplicating totals, please contact UW to see if any results have been turned directly into United Way.	Contact Gerry Taylor at United Way at (706) 543-5254 ext 223 gerryktaylor@bellsouth.net	
After Campaign	Notes	Activity Complete
When your campaign is completed, fill out the results envelope completely, enclose all completed pledges/payments and have the UW Representative verify all totals.	Please sign where appropriate and include contact information for you and the payroll contact. A receipt for all cash and check payments should be provided by the UW Representative at this time.	

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Partial Results Procedures	Notes	Activity Complete
<p>Some pledge types are time-sensitive for billing and/or processing and need to be turned in before your campaign is completed. When submitting partial results please make sure to include the donor's designation, matching and/or leadership information that is available. Please turn these items in as requested <u>as soon as they are received</u>. Please find a listing of these pledge types listed below:</p> <ul style="list-style-type: none"> • Credit Card Pledges • Direct Bill Pledges • Stock Pledges • Cash/Check Pledges 	<p>Make sure to include a total for each pledge type.</p> <p>During your campaign, your loaned executive will turn this information in as a partial result.</p> <p>Please keep copies of this information for your files.</p> <p>You should receive a receipt for the total of cash and checks each time you turn in results.</p> <p>You must use a results envelope each time you turn in results to your UW Representative.</p>	
<p>Call your UW Representative to schedule an appointment for wrap-up. Make sure you have totaled all types of pledges and filled out the unsealed envelope for him/her to verify.</p>	<p>All payroll pledges should be totaled in the end and indicated on the final results envelope.</p>	
Pledge Card Procedures	Notes	Activity Complete
<p>When submitting pledge cards as company results please refer to the submitting results standards for proper processing.</p>	<p>Make sure to group pledge types together and make sure the total matches the amounts reported on the results envelope.</p>	
Excel Spreadsheet/Electronic File Procedures	Notes	Activity Complete
<p>When submitting an excel spreadsheet or an electronic file as company results please refer to the Submitting Results Standards page for proper processing along with the procedures listed below.</p>	<p>Make sure that an original is included in the report envelope and that a copy is kept for your records.</p>	
<p>The spreadsheet or electronic file should include the pledge information based on the pledge card fields.</p> <p>Separate each field into individual columns as in the example below.</p> <p>Please have a separate worksheet for the following pledge types (if possible) and calculate a total by type.</p> <ul style="list-style-type: none"> • Payroll Deduction Pledges • Credit Card Pledges • Direct Bill Pledges • Stock Pledges • Cash/Checks 	<p>Company match information should be included with donor pledge information.</p> <p>The recognition name should indicate how the donor would prefer to be recognized as a leadership giver (ex: Mr and Mrs John Smith).</p> <p>Designation information should be listed if referenced by the donor and recorded on the report envelope.</p> <p>Visit our website, www.unitedwaynega.org for downloadable spreadsheet templates or the employee listing sheet.</p>	

Example spreadsheet format:

First Name	Last Name	Street	City	ST	Zip	Pledge Type	Donor Pledge	Company Match	DesgAmt 1	AgyName1	Recognition Name
Mary	Smith	123 Main St	Athens	GA	30606	Payroll	\$50	\$50	\$50		Mr and Mrs John Smith

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Submitting Results Standards		
Please refer to the following standards when submitting results:	It is important for you to keep a copy of all pledges for your file, but you must send a copy of payroll deduction pledges to your internal payroll department.	
Corporate Pledges: Corporate pledges and payments should be reported in the Corporate Gift Section on the UW Results Envelope.	Be sure to include all corporate pledge information (i.e.: matching dollars, etc)	
Payroll Deduction Pledges: Submit payroll deduction pledges with an accompanying total. Pledges must show a <u>dollar amount</u> * on individual pledge cards to get an accurate total. (See side example)	<u>*Example-</u> the individual or payroll department must indicate how much a % of their salary represents in dollars. The same standard applies for an hour's pay, fair share, and any option that is indicated on the payroll deduction portion of the pledge card.	
Credit Card Pledges: Submit credit card pledges including a legible card type, account number, expiration date, payment schedule (monthly, quarterly, etc) and an authorizing donor signature.	An authorizing donor signature is required if you are <u>not</u> submitting results electronically (via excel spreadsheet).	
Stock Pledges: Submit stock pledges including the complete home address and an expected stock transfer date.	Approximate transfer date is needed for reminder purposes.	
Direct Bill Pledges: Submit direct bill pledges (must be \$100 or more) including the complete home address and payment schedule (monthly, quarterly, etc).		
Cash/Check Pledges: Submit cash and checks with the company results envelope.	No post-dated checks will be accepted! United Way can provide a tax letter on any cash or check payments of \$250 or more (not payroll deduction amounts) to the individual. Please provide a current mailing address if applicable.	
Designations: Designation information, if applicable, should be submitted with donors' addresses. Be sure designations are in compliance with the designation policy	Designations can be made to a member agency or a county within the United Way of Northeast Georgia's service area	
Matching Dollars: Indicate all match information (internal matching program, etc) with donor pledge information. If necessary please supply a separate spreadsheet to indicate matches being used.	Include all information to be considered in the total (a gift plus a match) at the time your UW Representative picks up the results.	
Leadership: When submitting leadership information please include a recognition name (if applicable) and spouse's name and company if giving jointly.		