



Reporting Information & Instructions

The Employee Campaign Order Form is a vehicle for you to communicate with the United Way office about your campaign needs.

- Fill in the information at the top of the sheet.
- List all dates and times you will have campaign meetings.
- Check which supplies you will need.
- Schedule an agency tour if you would like.
- Fax the sheet to 417.863.9102.
- The Speaker's Bureau coordinator will arrange speakers for your meeting and will fax back a copy of the form after speakers have been confirmed.
- Please allow at least a week before the first meeting.

After the meetings are scheduled, you will want to begin organizing the corporate pledge and payroll deduction forms.

Corporate Pledge Card: Must be signed by the CEO or another person authorized to make corporate contributions.

- Check to see that the information listed on the top, left corner is correct. Make any corrections.
- Indicate how you want to be billed and how often.
- If the billing address is different than the address listed on the card, note the billing address.

Payroll Deduction Forms: Should be enough for every employee at your company. These are newly designed, so familiarize yourself with the changes. For additional forms or brochures, or if you have questions, call 417.863.7700.

- Individualize pledge cards for each employee. Include the amount of the previous year's gift.
- Employee will list the percent or amount of the contribution in the Option A Box.
- For gifts over \$500, check the appropriate box (Leadership) on the form.
- Employees may choose to designate funds (under the signature line on the form). Designations may only be made to United Way member agencies or initiatives.
- Your payroll department will keep the yellow copies, send the white to United Way office and give the pink to the donors.

Individual Pledge Cards: For those who wish to donate but not through payroll deduction.

- Individualize pledge cards for each employee. Include the amount of the previous year's gift.
- Employee will place total contribution, how much is paid now and how much is due in the appropriate boxes.
- Employee will sign and date the card.
- The yellow copy goes to the donor and the white copy of these cards (along with any cash or checks) should be included in the report envelope.

If these forms were not filled out thoroughly, please follow-up.

Once the pledge cards have been completed, you may start the reporting process.

Report Envelope: To provide information regarding corporate and employee gifts as well as the number of total employees and number of givers.

- Fill out the entire envelope – follow instructions at the top.
- Keep the yellow copies of the payroll deduction forms.
- Enclose cash, check and pledge cards of employees to be billed by United Way.
- Enclose signed corporate pledge card.
- Record corporate gift on the line marked “Corporate Pledges Only.”
- Record gifts of cash and check on the first line under “Employee.”
- Record all payroll deduction pledges on the second line.
- Record all individual pledges on the third line.
- Bring the totals down to the fourth line.
- Check how your company wants to be billed. If the billing address is different than the address on the top of the envelope, include that information as well.

****IMPORTANT:** An authorized signature is required.

Designation Preference Form: To notify United Way of all donors who wish to designate their gift to a certain agency. Payroll deduction cards have a place under the signature where donors can designate to a particular agency.

- Designations can only be made to United Way member agencies or initiatives. A list of these is included on the brochure.
- This form ensures that the donor’s wishes are followed.

Leadership Giving Enrollment Form: To notify United Way of all donors who give \$500 or more annually.

- Complete all requested information.
- Individuals on this list are recognized in
- **The reporting forms are important to the United Way to track donations. They are also important to your company!**

Recognition

- Companies with total employee giving greater than \$250 and per capita giving of \$25 or more are recognized at our annual meeting and in our annual report. For this award, it is important that we know how many employees you have as well as the number of people who contribute.
- Companies giving a corporate gift of at least \$500 will be recognized during the United Way Annual Meeting.
- With permission, individuals who give \$500 or more are recognized during the United Way Annual Meeting.