

United Way of Gaston County, Inc.

Campaign Coordinator Training

Preparing Your Company's Campaign Results

Congratulations, on a Successful Campaign! Now you are ready to report the good news to United Way. Follow the steps below to complete your Employee Campaign Report Envelope. You can also submit an electronic file (excel spreadsheet) which can be imported in directly into our system



Preliminary Preparation

1. Sort the pledges by the types listed on the front of the envelope
 - Payroll Deduction
 - Fully Paid Pledges
 - Individuals to Be Billed
 - Credit Card Pledges

2. Total the amount of dollars and donors that make up each group.

The pledge forms are in triplicate form. One copy goes to the donor, one copy to the payroll department and the other copy to United Way.

Completing the Campaign Report Envelope

Section I – Company Information

1. Company Name
2. Mailing Address
3. City, State, Zip Code
4. Name of Chief Executive Officer

Section II – Employee Giving

In this section you will record your employee campaign totals. When recording your totals, please do not include corporate gifts or results that you have already reported to us.

1. For the each gift type, enter the information you calculated in step one of the preliminary preparation:
 - ☐ **Number** of gift for each type
 - ☐ **Amount** of pledges for each type
 - ☐ **Amount** enclosed (paid) for each type

Cash and Checks are for Fully Paid Gifts, the amount enclosed must equal the amount of pledges for each type (ex. If you have \$500 as total amount of fully paid checks then you must have \$500 as the amount enclosed). There cannot be a balance for fully paid gifts.

Sometimes a donor will want to be billed, but will pay an amount at the time that they pledge. For example Andar Jackson pledges \$1,000 direct bill, but writes a check or gives cash for \$200 as payment toward it. The \$200 would be reflected in #3 in the amount paid column.

Section II – Employee Giving (cont'd)

2. Total each column and record in (Line #5)
3. Complete the of section II which are lines #6-#12
4. Print, Sign and Date and record your phone as indicated after #12

Additional Forms to Include in the Envelope

- 📄 **Donor Choice Forms** (if the donor designated his or her gift)
 - 📄 **Leadership Giving Report Forms** (listing donors giving \$1,000+) If you have the donors and amounts listed in your own spreadsheet, you may submit your spreadsheet instead of the form
 - 📄 **Community Investor Form** (listing donors giving \$500 – \$999.99 If you have the donors and amounts listed in your own spreadsheet, you may submit your spreadsheet instead of the form
5. Place all contents, pledge forms, checks, cash, and other documentation in the envelope and seal.

Section III – Employee Campaign Awards

This will be completed by the United Way Staff

When You Have Completed Your Employee Campaign Envelope

1. Contact your United Way Representative and inform them that the envelope is ready for pick up.
2. If you are delivering the envelope to the United Way of Gaston County, upon arrival, the envelope will be logged in by one of the staff and placed in the lockbox.

Submitting Your Results Electronically

1. Obtain the spreadsheet from the United Way
2. Fill in the information as appropriate
3. Save your spreadsheet
4. Add password to the file
5. E-mail the file to info@unitedwaygaston.org. In the subject field, put your company and Campaign Results (ex. Creative Documents Campaign Results)
6. E-mail the password, in a separate e-mail

To put a password on your spreadsheet

1. Make sure your spreadsheet is open
2. In MS Excel, go to Tools, then Options
3. Click on the Security Tab
4. Enter the password in the Password To Open Box
5. Click OK
6. A box will popup that says Reenter password to proceed
7. Enter the password you just entered previously and click OK.
8. Your spreadsheet is not password protected
9. You may close your spreadsheet