

Completing the Report Envelope



Step 1: Please complete company information and sign

Your report envelope should come pre-labeled with the company name and address.

- If the label is missing please type or neatly fill in the company name and address information.
- If any information on the label is incorrect, please update it for our records.

The shaded block to the right of the company information should indicate the name of the individual within the company who completed the report envelope. If there are any questions regarding the regarding the envelope, this is who we will contact.

Step 2: Tell us about your campaign results

Most companies will need to complete only line (A) Employee Gifts and line (D) Corporate Gifts in this section. Line (A) will record the employee portion of funds pledged to United Way. The total pledge and other information should be broken down into the categories shown on the envelope as follows:

Please Check One

- **Partial Report** – Check here if you still have pledge to collect and report to us. We can provide you with an additional report envelope, if needed.
- **Final Report** – Check here if your campaign is complete and no additional pledges will be reported

Line A - Total # of Employees – Please provide the total number employed by your company.

Line A and/or B - Total # of Donors – Please indicate the number of employees contributing to the campaign whose pledges are enclosed in the report envelope.

Line A and/or B - Payroll Deductions – Record the annual pledge amount donated through payroll deduction.

Line A - To be billed by United Way – Record the total of all pledges to be billed to an individual employee of the company. The individual's completed pledge card must be enclosed.

Line A, B, C or D - Paid by charge card – Record the total of all pledges made and paid by charge. To protect donors' credit card data, we ask that all individuals contributing by credit card visit our website, UnitedWayErie.org to process their pledge payment. Donors may also contact United Way at 456-2937 to provide their credit card information to a United Way staff member.

Line A, B, C or D - Cash – Record the total of all pledges made and paid by cash. This amount should agree with the total amount of cash enclosed in the report envelope.

Line A, B, C or D - Checks – Record the total of all pledges made and paid by check. This amount must agree with the total checks enclosed in the report envelope. Checks should be made payable to United Way of Erie County.

Line A, B, C and D - Total Pledge – Total all dollars raised by line.

Envelope Total – Total of all dollars raised by column.

- If your company has raised money for United Way by holding special fundraisers, the money raised should be recorded on line (C) Other Gifts.

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- If there is a community service fund or corporate pledge that is to be billed by United Way, please be sure that a completed and signed pledge card has been enclosed. If the pledge is paid in full the card is not necessary.

Step 3: Tell us where to send the statements

Billing information should be completed for any corporate, payroll or community service fund pledge that is to be billed. Please indicate the address the billing should be sent to if it is different from the company's address. When possible, the name of the individual to whom the billing should be directed to should be indicated as well.

Please indicate the frequency in which the account should be billed. If no preference is indicated the account will automatically be billed monthly.

If you should have any questions, please feel free to call Christine Yuhas or Izedia Brown at 456-2937 and we will be glad to help.

Please seal your envelope and contact United Way to pick up your completed report envelope.