

INSTRUCTIONS FOR COMPLETING REPORT ENVELOPE

1. Fill in your Company Name.
2. Total # Employed Locally. For an accurate percent participation calculation, it is important to know the number of local employees.
3. Is this a partial or final report? Check the appropriate box. If you have previously submitted a partial report, please DO NOT include that amount in this report.
4. Please enclose your **COMPLETED Roster of Givers and check appropriate box.**

ENVELOPE SUMMARY

A. Cash/Checks Enclosed Fill in the *Number of Donors Enclosed*, *Total Dollars Pledged* and *Total Payment Enclosed*. **Total dollars pledged and total payment enclosed SHOULD be equal.**

If a donor is making a partial payment on a pledge with this envelope, use line B instead of A.

B. To Be Billed Fill in the *Number of Donors Enclosed* and the *Total Dollars Pledged*. If someone is making a partial payment on a pledge, enter that payment in the *Total Payment Enclosed* box. Make sure pledge forms are filled out completely with name, address, and signature.

C. Stock Please call the United Way office (269) 343-2524.

NON-PAYROLL TOTALS Total the Number of Donors Enclosed, Total Dollars Pledged and Total Payment Enclosed columns.

D. Payroll Deduction Pledge Fill in the *Number of Donors Enclosed* and *Total Dollars Pledged* for these givers.

E. Special Events Enter dollars raised through organized fundraising events and activities in the *Total Dollars Pledged* and *Total Payment Enclosed* box.

F. CORPORATE PLEDGE ONLY

This is for the company's pledge, not the total collected from the company's employees. Make certain the corporate pledge form is signed, dated and enclosed.

5. **PLEDGE FORMS:** The total gift amount must be shown on each pledge form. Verify copies have been included in envelope by checking the appropriate boxes and the original has gone to the Payroll Department.
DESIGNATION FORMS: Please check for completeness and confirm all designation forms have been signed. "One percent of salary" or "\$2 per paycheck" is not sufficient, and will require a phone call to the Employee Campaign Manager for the correct dollar figure.

7. Please specify whom UW Staff should contact for questions on payroll deduction pledges and payments.

8. Please specify the UW Staff person or Campaign Liaison who assisted with your campaign.

Original Pledge Form → Payroll Department
Copy of Pledge Form → United Way of the Battle Creek and Kalamazoo Region

When employees turn in their pledge forms, please verify that all checks and designation forms are turned in and attached to UW's copy of the Pledge Form.

6. Please remember to **sign, date, indicate your phone number and email address** on the "Report prepared by" line on front of envelope.

ENVELOPE _____

RECAP _____

YEAR _____



709 South Westnedge Avenue
Kalamazoo, Michigan 49007-5099

Phone: (269) 343-2524
Fax: (269) 344-7250

1. _____
Company Name

2. Total # Employed Locally _____

3. Partial Report Final Report

4. Completed Roster of Givers

REPORT ENVELOPE

Please see instructions on back

Please report ONLY the amount in this envelope

ENVELOPE SUMMARY	NUMBER OF DONORS ENCLOSED	TOTAL DOLLARS PLEDGED	TOTAL PAYMENT ENCLOSED
A. CASH/CHECKS ENCLOSED			
B. TO BE BILLED			
C. STOCK			
NON-PAYROLL TOTALS <small>(A+B+C)</small>			
D. PAYROLL DEDUCTION PLEDGES			
E. SPECIAL EVENTS			
F. CORPORATE PLEDGE ONLY <small>(Report only if pledge form is enclosed)</small>			
COLUMN TOTAL <small>(NON-PAYROLL TOTALS+E+F+G)</small>			

For UW Use Only

Account Number

	Done By	Date
Envelope Summary		
Audit		
Data Entry		
New Accts: _____		
Review/Close		
Update Details		
Notes/Explanation of Changes		

PLEASE NOTE: Donors may pay their billed pledge by mailing a check, by using their online banking bill pay, via our website at www.changethestory.org, or by providing credit card information by telephone directly to the UW office. We value your relationship --- and your security.

5. The total gift amount must be shown on each pledge form.

- Original Pledge Form Payroll Department
- Copy of Pledge Form United Way of the Battle Creek and Kalamazoo Region

When employees turn in their pledge forms, please verify that all checks and designation forms are attached to UW's copy of the Pledge Form. Thank you.

6. Report prepared by: _____ / _____ Date: ____/____/____
(Please PRINT Name) (Phone)

Email address: _____

7. Person responsible for processing payroll deduction pledges:

_____ / _____
(Name) (Phone)

(Email)

8. UW Staff/Campaign Liaison

Envelope picked up by: _____

Date envelope was picked up: _____