

PLEDGE PROCESSING

Steps to be completed by the company's Payroll Department or ECM

- STEP 1 Make sure all Pledge Cards are accounted for and properly completed. Payroll Department will keep the Payroll Deduction Pledge Cards and submit the remainder of the Pledge Cards in the Report Envelope.
- STEP 2 Record all gifts on the Employee Summary Report Sheet. Total each column, each page and then all pages. *This report is also available on United Way's website www.seuw.org.*
- STEP 3 Complete the Master Payroll Deduction Card. Use the total of the Payroll Deduction column from the Employee Summary Report.
- STEP 4 Summarize results on the United Way Report Envelope.

Steps to be completed by the Campaign Consultant or ECM

- STEP 5 Return your United Way Report Envelope and all forms to the Sioux Empire United Way office, 1000 N. West Ave. #120 (Non-Profit Center)
- STEP 6 Complete a Campaign Appraisal Sheet (Pink Sheet) for every account. The Pink Sheets are included in your account packets.

PLEDGE PROCESSING

Each person giving to the United Way must fill out a Pledge Card. There are three key elements to the Card: Select Your Gift, Method of Payment, and Your Total 2011 Pledge & Signature.

Your Pledge & Signature: List the total pledge here. A signature allows the company to deduct from the payroll or the United Way to bill directly.



Sioux Empire United Way

1000 N. West Avenue, #120, Sioux Falls, SD 57104-1314
Phone: 605.336.2095 Fax: 605.336.7606

PLEDGE CARD

Name _____

Employer _____

Address _____

City _____ Zip _____

I would like to combine my Heart Club gift with my spouse.

Spouse's Name _____ Spouse's Employer _____

STEP 1: SELECT YOUR GIFT AMOUNT (check one box)

- Heart Club (\$500+)
- Golden Heart (\$500-\$749) \$ _____
 - Golden Heart Plus (\$750-\$999) \$ _____
 - Grand Heart (\$1,000-\$1,499) \$ _____
 - Grand Heart Plus (\$1,500-\$1,999) \$ _____
 - Heart of a Leader Bronze (\$2,000-\$3,499) \$ _____
 - Heart of a Leader Silver (\$3,500-\$4,999) \$ _____
 - Heart of a Leader Gold (\$5,000-\$9,999) \$ _____
 - Alexis de Tocqueville (\$10,000+) \$ _____

Rising Heart (Minimum of \$250, rising to \$500 within 5 years)

- | 1st Year | 2nd Year | 3rd Year | 4th Year | 5th Year |
|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|
| <input type="checkbox"/> \$5/week | <input type="checkbox"/> \$6/week | <input type="checkbox"/> \$7/week | <input type="checkbox"/> \$8/week | <input type="checkbox"/> \$9/week |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ |

Other Giving

- 1% of my salary _____ per pay period
- 1 hour pay/month _____ per week
- 1 1/2 hours pay/month _____ one-time total gift

STEP 2: SELECT PAYMENT TYPE (check one box)

- Payroll Deduction
- Cash or Check
- Automatic Bank Deduction (attach a voided check)
- Credit Card (call 336.2095)
- Gift of Stock (call 336.2095)
- Bill Me (gifts of \$100 or more can be billed quarterly)

STEP 3: YOUR SIGNATURE

Total Pledge: _____

SIGNATURE _____

DATE _____

No goods or services were given in exchange for this contribution. Please remember Sioux Empire United Way in your will.

THANK YOU! Please turn all cards in to your payroll office for processing.

To receive email updates with information about how your gift to United Way is making a difference, please send an email to unitedway@seuw.org.

Select your gift: Weekly and monthly giving options as well as the leadership giving levels are given as options. There is also a space for a one time gift amount.

Method of Payment: If the donor is NOT paying cash, then a Method of Payment must be selected. The options are Payroll Deduction, Cash or Check, Automatic Bank Deduction, Credit Card, Gift of Stock, or Bill Direct. An address is required for Bill Direct. A voided check is required for Automatic Bank Deduction.

Combining with Spouse: If the donor is combining their gift with their spouse for Heart Club or Rising Heart, the box should be checked and their spouses name and employer listed so that the gift can be accurately recognized.



EMPLOYEE SUMMARY SHEET

This report will enable you to total your Cards and easily complete the front of the Report Envelope. You should complete one line for each Pledge Card.

This report is also available at www.seuw.org/CampaignResources

Total # Contributions: This amount should equal the number of Cards. If you have 100 total employees and 62 employees made a contribution, then you would put 62 in this blank.

Total Amount Pledged: The amount listed in this column should equal what the contributor wishes to give for the entire year. If the amount pledged is \$2 per week, then the Total Amount Pledged would be \$104.

NOTE: *Put the Bill Direct, Gift of Stock, Automatic Bank Deduction, Credit Card and Cash Pledge Cards in the Report Envelope.*

Payroll Deduction Cards must be kept by the payroll clerk.

Heart Club: Any employee that pledges a gift of \$500 is recognized by United Way as a Heart Club member. There is a place on the Employee Summary Report to indicate this Heart Club status to United Way. Individuals are also eligible for Heart Club if they combine their gift with their spouse's gift to reach \$500. In this case the *Wants to Combine with Spouse* box needs to be checked and the spouses name and employer filled in.

Rising Heart: Any employee that pledges a minimum gift of \$250 with a plan to increase to \$500 within five years will be recognized at the Rising Heart level. There is a place on the Employee Summary Report to indicate this giving level to United Way. Individuals are also eligible to combine their Rising Heart gift with their spouse. In this case the *Wants to Combine with Spouse* box needs to be checked and the spouses name and employer filled in.

Retiree: If an individual has retired from your company but still counts their United Way gift toward your employee total, please check the box marked *Retiree of the Company*.

MASTER PAYROLL DEDUCTION CARD

A Master Payroll Deduction Card must be filled out by those companies with payroll deduction. This card is the total dollar amount of employee payroll deduction throughout the year.

Contact Person in Payroll: It is important to provide a name & phone number of a specific person in payroll that can answer any questions that may arise.

Sioux Empire United Way	
Master Payroll Deduction Card	
(Enclose Master Payroll Deduction Card with each Report Envelope)	
Check	First Report _____
One:	Additional Report _____
	Final Report <u>X</u> _____
Firm Name:	<u>Company XYZ</u>
Address:	<u>333 Roadway Ave SF SD 57104</u>
Amount of Payroll Deduction for this Report only \$	<u>1,951.00</u>
Contact Person in Payroll	<u>Sue Jones</u>
Phone #	<u>555-1234</u>
<u>Sue Jones</u>	<u>10-18-06</u>
Signature of Authorized Firm Representative	Date

REPORT ENVELOPE



Sioux Empire United Way

DIVISION: MAJOR FIRMS

UNITED WAY REPORT ENVELOPE

SIOUX EMPIRE UNITED WAY ▼ 1000 N. WEST AVE. #120 ▼ SIOUX FALLS, SD 57104 ▼ PHONE (605) 336-2095

PARTIAL REPORT

FINAL REPORT

**COMPANY'S TOTAL
NUMBER EMPLOYEES
(PART & FULL TIME)**

	Payroll Deduction		+	Cash / Check		+	Bill Direct / Stock		+	Auto Bank Ded / Credit Card		Totals	
	# of Givers	\$ Amount		# of Givers	\$ Amount		# of Givers	\$ Amount		# of Givers	\$ Amount	# of Givers	\$ Amount
Corporate Gift													
Employee Gifts													
Other Gifts / Money from Misc Fundraisers													
Totals													

CHECKLIST

- ___ 1. Have you completed and enclosed the **Employee Summary Report** with this envelope?
- ___ 2. Have you kept all **Payroll Deduction Pledge Cards**? These are your authorization to make deductions.
- ___ 3. Have you completed and enclosed the **Master Payroll Deduction Card** for full amount of payroll deduction?
- ___ 4. Have you enclosed all **Cash or Check Pledge Cards**, including the cash & checks, with this report?
- ___ 5. Have you enclosed all **Bill Direct/Gift of Stock Pledge Cards** with this report?
- ___ 6. Have you enclosed all **Automatic Bank Deduction/Credit Card Pledge Cards** with this report?

Name of person completing this envelope: _____ Phone _____

FOR AUDITOR'S USE ONLY	
CASH & CHECKS \$ _____ AUDITED BY: _____	

Thank You!

REPORT ENVELOPE INSTRUCTIONS

Every United Way account assigned to a Volunteer Campaigner is packaged in a Report Envelope. The front of the envelope must be completed before it can be audited by other United Way Volunteers.

Total # of Employees: This is the total number of employees that work for the company, not just the number of employees giving to the United Way.

Corporate Gift: This column is filled out ONLY if the corporate Pledge Card is enclosed in the Report Envelope.

Payroll Deduction: The total amount pledged that will be deducted by the company payroll department.

Cash / Check: The total amount of cash is the amount of actual cash enclosed in the envelope.

Bill Direct: The total amount pledged that will be billed and collected by the United Way office.

Gift of Stock: The total amount pledged that will be paid through stock sale.

Automatic Bank Deduction: The total amount pledged that will be deducted by the contributor's bank.

Credit Card: The total amount pledged that will be billed to the contributor's credit card.

TOTAL: The total amount of all pledges.

Check List: This list will help you assemble all the items needed before you turn in the Report Envelope.

Signature: When you have completed the front of your envelope, sign your name so if there are any questions we will know whom to contact.