

United Way of Southwest Minnesota Workplace Campaign Report

Every Person. Every Community.

United Way of Southwest Minnesota is an autonomous, local organization working to create long lasting change in the communities we serve in Lincoln, Lyon, Murray, Yellow Medicine and portions of Cottonwood, Lac qui Parle, Nobles and Redwood counties of Minnesota.

PLEASE DO NOT WRITE IN DARK GRAY SHADED AREAS!

Total # of Employees _____	<input type="checkbox"/> Partial Report (more money coming)	<input type="checkbox"/> Final Report (no more money expected)	Date: _____
Company			
C.E.O.			
Mailing Address			
City, State, Zip			
Phone			
Campaign Ambassador			
Payroll Contact			
Billing Contact			
Billing Address (if different from above)			

Pledge and Donation Totals (be certain to report amounts only once!)

Employees	# of Donors/ Events	Total Contributions	Amount Enclosed	For United Way Office Use Only	For United Way Office Use Only
Cash/Check Donations		\$	\$		
Payroll Deduction Pledges		\$	\$		
Credit Card Pledges		\$	\$		
Special Events Funds		\$	\$		
Total This Report		\$	\$		
Corporate Contribution or Pledge (please fill out pledge form)		\$	\$		

Total Pledges Corporate + Employees	\$	\$
	Total Amount This Report	UW Audited Amount

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**United Way
of Southwest Minnesota**



United Way of Southwest Minnesota

WORKPLACE CAMPAIGN REPORT FORM CHECKLIST

To be completed by Campaign Ambassador or other workplace contact

C h e c k	S t e p	Description
	1	Collect all pledge forms.
	2	Make sure all employee information is filled out, including donor name, company, address, phone number, email address, etc.
	3	Make sure there is a signature on every form.
	4	Make sure there is an amount in the "My total annual gift" if using payroll deduction.
	5	<p>Make sure donors have marked a payment preference, including the following:</p> <ul style="list-style-type: none"> * Payroll Contribution: <ul style="list-style-type: none"> • Make a copy for our records OR bring originals to our office and we can make a copy for our records. Your payroll department should keep the originals. • Verify that My total annual gift = # of pay periods x pledge/per pay period * Cash or Check: <ul style="list-style-type: none"> • Be certain cash/check matches pledge form amount and that checks are made payable to "United Way of Southwest Minnesota." * Credit Card: <ul style="list-style-type: none"> • Be certain pledge form is filled out with sufficient information so that United Way of Southwest Minnesota staff can contact the donor if there are any questions on their online payment.
	6	Begin filling in the "Employee Campaign Report" on the opposite side of this page - indicate total number of employees; check whether this is a partial or final report; and indicate the date of this report.
	7	Make sure company information is completely filled in. <u>Company name should be listed as you would like it to be listed on any recognition lists.</u>
	8	In the "Cash/Check" row of the Employee section indicate: # of Donors; Total Contributions; and Amount Enclosed.
	9	In the "Payroll Deduction Pledges" row of the Employee section indicate: # of Donors; Total Contributions; and Amount Enclosed (if any).
	10	In the "Credit Card Pledges" row of the Employee section indicate: # of Donors; Total Contributions; and Amount Enclosed (if any). <i>Note: It is recommended that these donors make their credit card donations directly through our website at www.UnitedWaySWMN.org</i>
	11	In the "Special Events" row of the Employee section indicate: # of Events; Total Contributions; and Amount Enclosed.
	12	In the "Total This Report" row of the Employee section indicate totals for each of the three columns: # of Donors; Total Contributions; and Amount Enclosed.
	13	In the "Corporate Contribution" section, indicate the corporate pledge/donation amount under "Total Contributions" and any payment on that pledge under "Amount Enclosed." Please also include a pledge form for the corporate donation, indicating how it will be paid and, if possible, when it will be paid. Also, if an invoice needs to be sent, please indicate the date the invoice should be sent from our office.
	14	At the bottom of the page, please indicate the total pledges/donations reported on this form.