CAMPAIGN REPORTING FORMS

Pledge Listing Sheet

This Excel file can be completed electronically, or you may print it out and fill it in by hand. The file contains two spreadsheets – fill out the Listing Sheet first. List every pledge collected during your campaign as follows:

Fill in organization’s name and account number *(account number appears on sticker on the left hand side of your Report Envelope)*.

1. Fill in the organization’s phone number and the date.
2. Fill in the first and last name of each donor.
3. Put an “x” in the “Leadership Giver” column matching their payment choice *(payroll deduction, cash/check, direct bill, credit card or stock/securities)*. For example, if they are pledging $52 through payroll deduction, you would enter $52.00 in the “Payroll Deduction” column.

If you complete sheet electronically, the columns will automatically total at far right of the sheet, and also at top of the sheet. Also, if entered electronically, the information on the listing sheet(s) will tabulate onto the “Summary Sheet” spreadsheet automatically.

Pledge Summary Sheet

 To find this form on our website go to [www.unitedwayhp.org](http://www.unitedwayhp.org), click on the “Campaign” tab, under Campaign Toolkit and find the Pledge Listing Sheet with Summary.

Most of the information on this sheet should automatically tabulate from the Pledge Listing Sheet if you enter data electronically. The only information you will need to enter is:

* Final report – just answer yes or no.
* Organization’s address – enter the organization’s complete mailing address.
* ECC’s email address – enter the ECC’s email address *(note: if someone other than the ECC is completing the listing sheets, they should enter the ECC’s information where indicated).*
* Number of employees - enter the number of employees who were solicited during the campaign.
* Cash/check “total paid herein” – fill in the total amount of cash/checks being submitted.
* Employee fundraisers – enter any monies collected through fundraisers both in the “pledged” column and in the “paid” column.

Corporate Pledge Forms

All the appropriate contact information should be pre-printed at the top of this form. Also pre-printed on the form is the amount of the organization’s 2020 corporate pledge. Please fill in the amount of the 2021 corporate pledge and indicate how the pledge will be paid. Note that this is only a pledge and the payment may be made any time before December 31, 2022. Have the appropriate representative sign the form and return it with the rest of the organization’s final campaign report.

Cash Report Envelope (Green)

Use this envelope to submit your CASH, CHECK OR CREDIT CARD PLEDGE FORMS ONLY. **Please do not include payroll deduction or direct bill pledge forms in this envelope.**

1. Fill in the number of givers and total amount enclosed for the following types of pledges: cash, check, credit cards and fundraising events *(cash only).*
2. Total all columns.
3. Fill in your name, title and phone numbers.
4. Sign and date the report envelope.
5. Seal your report envelope.

IMPORTANT – UW cannot accept post-dated checks. If a post-dated check is received, please return it to the ECC and have them consult the donor.

Caring Club Card Form (Gold)

Please complete this form and return it in your Campaign Report Envelope (Blue).



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