

Helpful Hints for Completing the Corporate and Employee Summary Form

Company Information:

- Enter company name and address

Section 1 – Corporate Pledge Information. Do not enter any employee information in this section.

- If your company has a matching gifts program, please indicate yes or no
- Enter the percent of the matching gift, if applicable
- Columns A – C
Enter amount of the corporate gift, amount paid now if applicable, and balance due
- If a balance is due, select how often payments are to be made (monthly, quarterly, or other) and whether the company would like to be billed

Section 2 – Employee Pledge Summary

- Provide total number of employees in the organization. Remember to include management. # of employees is vital, along with # of donors in each category, for analyzing employee results (average gift, per capita, percent participation)
- Columns A – E
Please complete all 5 columns regarding # of employees giving and the dollar amounts for each type of gift utilized. This will aid in balancing the contents of the report envelope.
- Enter total employee campaign dollars only. Do not include corporate gift or special events on this line.
- Column F
Enter special events proceeds here along with # of donors gave
- Company billing: indicate the organization's schedule of payments to United Way for employee payroll deductions and whether or not a statement is requested

Section 3 - Checklist

- Use this summary sheet in conjunction with the pledge listing spreadsheets
- Provide designation information when applicable on the pledge listing spreadsheets
- Provide addresses of those employees who designate or are leadership givers on the pledge listing spreadsheets
- Enclose only the “United Way Office” copies of the pledge forms
- Enclose checks and cash contributions attached to pledge form
- Enclose signed pledge forms for bill directs, stock, and credit card pledges
- **Important! Give a copy of the payroll deduction pledge forms to the payroll department**
- Sign the summary form. Provide an email address in case of questions. Date the form.