



United Way
of the Brazos Valley

Pledge Form Checklist

Donor Information

- Ask for the employee to fill out the donor information section completely. The pledge form is a legal document.
- Pledges made by payroll deduction require:
 - Name, signature, and phone number.
 - Fill in the “easy payroll deduction” box, then multiply the amount you wish to have deducted from each paycheck by the number of pay periods per year and enter the total annual gift in the next blank. Deductions should begin in January 2011 and end in December 2011.
 - You may also wish to contribute a percentage of your annual salary. Anything that is 1% or above is considered contributing your “fair share.”
- Pledges made by check require:
 - Name, signature and phone number.
 - Attach checks (or cash) to the pledge form with a paper clip (no staples, please).
 - Without exception, checks must be made payable to United Way, United Way of the Brazos Valley, or UWBV
 - Checks are deposited when the report envelope is turned in to United Way of the Brazos Valley.

Acknowledgement

- Donors should retain a copy of the pledge form for their tax purposes.
- Payroll deductions are reported as part of employee paycheck stubs.
- Donors who wish to remain anonymous must indicate this intention in the top section of the pledge form.
- Donors who contribute a one-time gift of \$250 or more will automatically receive a receipt from United Way of the Brazos Valley that can be used for income tax purposes.

Undesignated pledges

- Any amount entered without a designation will be distributed according to the recommendations of the Allocations Committee of the United Way of the Brazos Valley Board of Directors. Please contact United Way to find out how you can volunteer to be a part of this process.

Effective date

- The effective date for all pledges is December 1, 2010.
- Deductions should begin on January 1, 2011.

Check for accuracy

- Be sure the employee calculates gift totals in the gray boxes and multiplies and adds correctly.
- Check for legibility



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Report Envelope Checklist

Company Information

- Please fill out all information on the report envelope, including company name, address, and phone. This is important for record keeping, thank you notes, and recognition.
- Enter the total number of employees at your company. This is a very useful tool for United Way to make improvements on how we serve you.

Pledge Data

- Fill in the appropriate number of donors in each category of gift (cash/check, payroll deduction, bill me, charge/credit card), paying careful attention to the level of giving for each donor (under/over \$1000).
- Fill in the total dollar amounts associated with each of the gift categories you entered in the previous step.
- Total all donors and gifts, and enter those figures in the boxes provided at the bottom of the envelope.
- Enclose a list of fair share givers and a list of leadership givers if available.

Final Steps

- Seal the envelope and initial across the flap. This helps to identify tampering and protects you.
- Notify your Loaned Executive that the envelope is ready and make arrangements for its return to the United Way of the Brazos Valley office.