

## WRAPPING UP THE CAMPAIGN

### 7.1 Reporting Results: Campaign Spreadsheet (template)

New this year, we have developed a tool for ECCs to use to track the results of their workplace in MS Excel. This is an OPTIONAL spreadsheet for ECCs and/or their HR/Payroll department to use to track workplace campaign pledges.

To access the spreadsheet, please visit [www.hlunitedway.org](http://www.hlunitedway.org). Below is the list of instructions included with the spreadsheet and a same view of the template.



Head of the Lakes  
United Way

#### 2017-18 Annual Workplace Campaign

Please complete the following steps to ensure your totals are recorded accurately.

- 1 Complete the top portion (all RED fields) of the spreadsheet including organization name, contact information for the person completing the spreadsheet, total # of employees, total # of donors, and the date that payroll pledges begin for the 2017-18 campaign.
- 2 List each donor. Last name, first name, email, preferred phone/type.
- 3 Enter the amount of the donor's gift in the appropriate column.
- 4 If adding extra rows to accommodate more donors, make sure the summation formula includes the additional donors. You may need to set the formula again. You will also need to re-number your donors.
- 5 A geographic area must be selected for each donor's gift (column G). If a donor wishes to split their gift between 2 or more areas, please add their name on multiple lines as needed and split the total gift amount per the donor's instructions.
- 6 Please PRINT the completed spreadsheet and include it in the final campaign envelope with the original HLUW employee pledge forms. The totals on the spreadsheet should match the front of the campaign envelope. Additionally, please EMAIL a copy of the spreadsheet to [finance@hlunitedway.org](mailto:finance@hlunitedway.org) with "Company Name 2017-18 Campaign Spreadsheet" in the subject line.

If you have any questions, please use the email address above or contact Jeanette in pledge processing at 218-726-4868.

**Thank you for all your hard work running a successful United Way campaign!**

**Organization Name:** \_\_\_\_\_

**ABC Company**

**Form Completed By (name):** Sally Sample **Phone #** (218) 722-1234

See Spreadsheet Instructions Tab for information on completing and submitting this form.

Total Number of Employees at your Company:	15
Total Number of Donors:	4
Date Payroll Deductions for 2017-18 Campaign will begin:	1/1/2018

*Most companies start on January 1st*

For Payroll Deductions - Please make copies of employee pledge forms for your HR Department

**2017-18 EMPLOYEE PLEDGES**

Donor #	LAST NAME	FIRST NAME	Donor Email Address	Donor Preferred Phone	Donor Phone Type	Geographic Area for Donation	Total Annual Payroll Gift	Total Cash Gift	Total Check Gift	Online Pledge Total	Total To Be Billed	Credit Card Total Gift	Stock Gift	Employee Annual Campaign Total Gift
1	Living	United	<a href="mailto:1donor@address.com">1donor@address.com</a>	(218) 722-2345	Work	Greater Duluth	120.00							120.00
2	Giving	Everyday	<a href="mailto:2donor@address.com">2donor@address.com</a>	(218) 722-3456	Work	Superior-Douglas County			25.00					25.00
3	Generous	Donor	<a href="mailto:3donor@address.com">3donor@address.com</a>	(218) 390-4567	Cell	Greater Duluth	1,200.00							1,200.00
4	Thankful	Supporter	<a href="mailto:4donor@home.com">4donor@home.com</a>	(218) 626-1234	Home	North Shore of MN					60.00			60.00
5														-
6														-
7														-
8														-
9														-
10														-
11														-
12														-
13														-
14														-
15														-
16														-
17														-
18														-
19														-
<b>Employee Total Gifts= Total A</b>														<b>1,405.00</b>

**TOTALS by Pledge Type**

1,320.00	-	25.00	-	60.00	-	-	-	<b>Total B</b>
								<b>Pledge Type totals =</b>
								<b>1,405.00</b>

Total A should equal Total B. Use this amount for your Company's total employee dollars raised.