

Fundraising Report Instructions



You can find the electronic 2023 Fundraising Report here: www.tauw.org/campaignreport

If your organization is only reporting payroll pledges and no cash or checks, follow these instructions:

1. On Fundraising report, add all employee/retiree deductions and complete line 1. "Payroll Deductions" with "# of Donors" and column E "Pledges." Complete column "D+E TOTAL." Fill in "# of pay periods" and "Payroll deductions begin (mm/yy): __/__."
2. Complete line "II. TOTAL" for all columns.
3. Send the PAYROLL COPY of pledge cards listed on line 1 to your payroll office.
4. Send copy of fundraising report AND either pledge cards or donor spreadsheet to: campaignreport@tauw.org. If you are unable to include pledge cards for PAYROLL deductions or send a spreadsheet by email, please send the Donor Information Spreadsheet located at <https://www.tauw.org/campaigns/campaign-hq/> to datamanager@tauw.org.

If your organization has payroll pledges, checks and/or cash, follow these instructions:

1. On Fundraising Report, add all employee/retiree deductions (multiple and single payroll, and other gifts to be paid by deduction) and complete line 1. "Payroll Deductions" with "# of Donors" and column "E Pledges." Column "D+E TOTAL" should fill in automatically. Fill in "# of pay periods" and "Payroll deductions begin (mm/yy): __/__."
2. Place the TAUW COPY of all completed pledge cards listed on line 1 in Gray Envelope "Payroll Deduction Pledge Cards."
3. Send the PAYROLL COPY of pledge cards listed on line 1 to your payroll office.
4. On Fundraising Report, if applicable, add unpaid gifts (pledges for donors who want to be billed) and fill in line 2. "Employee Gifts-To Be Billed" with "# of Donors" and column "E Pledges." Column "D+E TOTAL" should compute automatically.
5. If applicable, place all employee to be billed pledge cards in Yellow Envelope "Other Pledge Cards."
6. On Fundraising Report, add all employee paid gifts and fill in line 3. "Employee Gifts-Money Enclosed" with "# of Donors", column "A Currency" with gifts paid by paper bills, column "B Coin" paid by coin and column "C Checks" paid by check. Verify that column "D=A+B+C Total Money Enclosed" and column "D+E TOTAL" computed correctly.

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7. If a donor paid a pledge with cash, please put pledge card in Yellow Envelope marked "Other Pledge Cards" and put cash in Bag marked "BAG A – CURRENCY ONLY."

If a donor paid a pledge with a check, place check **AND** pledge card together in Orange Envelope marked "Pledge Card with Check Payment." **Please make sure all checks are payable to Tulsa Area United Way (TAUW).**

8. On Fundraising Report, add all Special Event donations and fill in line 4. "Special Events" with Column "A Currency" with special event money paid by paper bills, column "B Coin" paid by coin and column "C Checks" paid by check. Verify that column "D=A+B+C Total Money Enclosed" and column "D+E TOTAL" computed correctly.
9. - Place Special Event Cash in Bag marked "BAG A – CURRENCY ONLY"
- Place Special Event Coins in Bag marked "BAG B – COIN ONLY"
- Place Special Event Checks in Green Envelope "Special Event Checks Only" **Please make sure all checks are payable to Tulsa Area United Way (TAUW).**
10. On Fundraising Report, complete line "5. Corporate Gift" in Column "C Checks" and Column "D=A+B+C Total Money Enclosed" if enclosing check. If you would like to be billed for your Corporate Gift, complete Column "E Pledges." Verify that column "D+E TOTAL" computed correctly. Fill in "Corporate gift payments begin (mm/yy): ___/___."
11. If paying Corporate pledge by check, place check AND pledge card in Orange envelope marked "Pledge Card with Check Payment."

If you wish to be billed for your corporate pledge, put corporate pledge card in Yellow envelope marked "Other Pledge Cards."

12. Verify that line "II. TOTAL" for all columns computed correctly.

For all gifts submitted elsewhere, such as online, please complete Section III. If this does not apply, skip to #16

13. Complete line 1. "Employee Gifts – To Be Paid by Credit Card" with "# of Donors," Column "E Pledges," and "TOTAL" column for any employees who pledged directly online at www.tauw.org using a credit card.
14. Complete line "2. Employee Gifts – To Be Paid by Auto Debit" with "# of Donors," Column "E Pledges," and "TOTAL" column for any employees who pledged directly online at www.tauw.org using auto debit.
15. Verify that "III. TOTAL" for all columns computed correctly.

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16. Verify that "IV. Grand Total" ("II. Total" + "III. Total") for all columns computed correctly.
17. Send a copy of your fundraising report to campaignreport@tauw.org.
18. ****Place copy of fundraising report and all envelopes and bank bags in large white envelope.****

If you have CASH or COIN, please make sure to put a total on the outside of each bank bag of the amount of cash or coin in each bag.

-Also-

Please do not put anything other than CASH in the Currency Only bank bag and please do not put anything other than COIN in the Coin Only bank bag.

Options for turning in Fundraising Report

1. If NO CASH BUT CHECKS, mail enclosed return envelope to:
Tulsa Area United Way
Dept. 1189
Tulsa, OK 74182
2. If you either HAVE CASH or wish to drop off your campaign envelope with materials, you can drop off at this location:
Bank of Oklahoma
6242 E. 41st St.
Tulsa, OK 74135
 - Enter property from 41st St in between Buffalo Wild Wings and the Kum & Go.
 - Pull up in front of building by portico, then follow road on the left side of building around to the back of the building.
 - **See images on next page for step by step instructions on how to get to the correct door.**

Fundraising Report Instructions

1) Please park in an available space in the parking lot behind the BOK building shown below. From the parking lot, head toward the left side:



2) Once you get to this location below, walk straight ahead toward the circle safety mirror:



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3) Continue going straight toward the circle safety mirror:



4) Once you reach the wall, turn right and you will see the Lockbox Drop-off Door:



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5) You are looking for the **Remittance Couriers Sign**, where you will find the correct door to enter. Pick up the phone to the left of the door in the square box and call the number listed by the phone. Tell them that you are dropping off a campaign packet for the Tulsa Area United Way, and they will buzz you in the door.



If you would like to schedule a pick-up of your fundraising report and materials instead, please call 918-583-7171 or email campaign@tauw.org.