1. Prepare Envelope Contents

Separate donation payment types:

- CASH – **one pile each** for Employee Contributions and Special Events
- CHECKS – **one pile each** for Employee Contributions, Special Events and Corporate Contributions
- CREDIT CARDS – **one pile each** for One-time & Sustaining. Be sure the following are complete:
  - Card number
  - Expiration Date
  - Full address
  - Signature
- PLEDGE FORMS – each donation should have a Pledge Form (except for Special Events donations). Be sure the following are complete:
  - Full address
  - Signature
- PAYROLL DEDUCTIONS – You (the Ambassador) are responsible for making copies of all Payroll Deduction Pledge Forms and providing these to your company payroll department. Include originals in envelope. Be sure the following are complete:
  - Number of paychecks affected
  - Amount deducted from each paycheck
  - Amount of total gift

2. Complete Envelope Form

- **Section 1** – handwritten, stamp or label is fine
- **Section 2** – this section is required if there are Payroll Deductions
- **Section 3** – do **not** include online pledges or previously reported pledges **unless** an employee makes a pledge via the online tool and **cash/check is placed in the envelope**

3. Assemble Envelope

- Bundle all payments by section, place the contents in an envelope, include completed envelope form and completely seal the envelope. Feel free to attach notes to any pledge forms or bundles that you feel may need additional clarification.
- If there is cash, please contact your Loaned Executive to arrange a pickup. If there’s not cash, please sign your name across the seal and mail the envelope to:

United Performing Arts Fund
301 W. Wisconsin Ave, Ste 600
Milwaukee, WI 53203

*Thank you for serving as a UPAF Workplace Giving Ambassador! If you have any questions about the envelope process, please call the UPAF office at 414-273-UPAF (8723).*
Workplace Giving Envelope Checklist for Ambassadors

**Pledge Form Checklist**

- Complete address and contact info
- Is it a payroll deduction? If yes, write number of pay periods.
- Is it credit card payment? If yes, write number and expiration date

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**Company Name Here:** MWP22

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**Workplace Giving Envelope Checklist**

- **Section 1** – handwritten, stamp or label is fine
- **Section 2** – this section is required if there are Payroll Deductions
- **Section 3** – do not include online pledges or previously reported pledges unless an employee makes a pledge via the online tool and *cash/check is placed in the envelope*
- Bundle all payments by section, place the contents in envelope and completely seal the envelope
- Sign your name across the seal
- Arrange for pickup or mail envelope

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Have a great day! 😊

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**Pledge Form Checklist**

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**Office Use Only**

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**Workplace Giving Report Envelope**

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**Company Information**

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**Payroll Information**

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**Envelope Contents**

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**Report Completed By:**

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**Date:**

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**Email:**

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**Phone:**

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**Signature:**