Workplace Giving Envelope Checklist for Ambassadors

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** – be sure the following is completely filled out:
  - 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 is completely filled out:
  - 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 is completely filled out:
  - Number of paychecks affected
  - Amount deducted from each paycheck
  - Amount of total gift

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

Assemble Envelope

- Bundle all payments by section, place the contents in an envelope 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

**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

Have a great day! 😊

**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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**Workplace Giving Report Envelope**

<table>
<thead>
<tr>
<th>Campaign Information</th>
<th>Payroll Information*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Name of Payroll Contact</td>
</tr>
<tr>
<td>Address</td>
<td>Email</td>
</tr>
<tr>
<td>City</td>
<td>Phone</td>
</tr>
<tr>
<td>State</td>
<td>Date payroll deductions will begin</td>
</tr>
<tr>
<td>Zip</td>
<td>Payments will be made</td>
</tr>
<tr>
<td></td>
<td>Quarterly</td>
</tr>
<tr>
<td></td>
<td>*required if offering payroll deduction</td>
</tr>
</tbody>
</table>

**Envelope Contents:** Please report ONLY contributions that are enclosed in this envelope. Do not include previously reported pledges or online pledges.

<table>
<thead>
<tr>
<th>Cash</th>
<th>Employee Contributions</th>
<th>Special Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checks</td>
<td>Employee Contributions</td>
<td>Special Events</td>
</tr>
<tr>
<td>Checks</td>
<td>Corporate Contribution</td>
<td></td>
</tr>
<tr>
<td>Checks</td>
<td>Pledges to be billed (pledge card must include address info.)</td>
<td></td>
</tr>
<tr>
<td>Payroll Deduction (Please make copies of PD cards. Send the originals to UPAF and provide copies to your payroll department.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

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**Office Use Only**

Account #

Pledged by

Envelopes #

Date Entered

Online | Partial | Final

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Please call the UPAF Operations department at (414) 273-5723 or email eg@upaf.org if you have any questions.