

Saying “Thanks”

After a successful fundraiser, it is very important to say “thanks” to all the employees who helped make your fundraising a success. People want to feel appreciated when they have done something positive, and helping the community by giving to United Way is no exception. There are many different ways to say thank you to all your co-workers who helped make it possible.

United Way Merchandise

Give T-shirts, pens or note pads with the United Way logo on them. Create your own or order items from United Way.

Thank You Sack Lunch

Order sack lunches for every donor. Include a thank you note from your CEO or Deborah A. Zuloaga, CEO of United Way of El Paso. Or, include thank you drawings or letters from children served by a United Way programs.

Prize Patrol

Have management or the fundraising committee wheel the prizes around the office on a cart until they reach the winner for public recognition. If you do this once a day during your fundraising activities, it serves as a reminder to others to turn in their pledge form.

Waffle/Pancake Breakfast

Have management serve up breakfast for everyone who contributed.

Milk and Cookies

Design a special cookie wrapper with a thank you message. Place the wrapper around a package of cookies. Homemade cookies would be a special treat.

Balloons or Flowers

Surprise each donor the last day of the fundraising efforts. Place a balloon or flower at their desks to thank them for their thoughtfulness.

Candy Gram

Show your employees a little appreciation with a treat for their sweet tooth! Distribute candy bars with a thank you message attached to all participants who donated in the United Way Fundraising efforts.

Scooping Up Success

An ice cream social to help celebrate is a great way to say thank you. Have the management team scoop up the ice cream and personally thank each employee.

“I Donated” Cookout

Offer a cookout to all who contributed. Have the cooks wear aprons with the United Way logo.

Root Beer & Brats

Host a root beer and brats thank you party for donors. This is a great sports theme tie-in.

New Tax Implications

Donors are now required to have a tax receipt to substantiate all contributions, regardless of amount. Payroll deduction pledges, just like all other contributions, are now only deductible by the donor if they can produce a canceled check or a receipt that indicates:

- The name of the charity
- The date of the contribution
- The amount of the contribution

What do Donors Need?

Check donation: A canceled check is sufficient proof because it contains the three points of information required by the IRS (name of the charity, and date and amount of the contribution).

Cash donation: A written acknowledgement from donee organization.

Payroll Deduction Donations: Donors need a pay stub, W-2 or other document furnished by the employer that indicates the amount withheld during the tax year for payment to the donor organization

AND

A pledge card, or other document prepared by the donee organization that shows the donee name.

When Did this Take Effect?

This change in IRS guidelines took effect for taxpayers claiming charitable contribution deductions for gifts made in the taxable years beginning after August 17, 2006. So, for payroll deduction pledges made in the Fall 2008 campaigns, the donors will need copies of their pledge forms to substantiate their charitable contributions for tax returns filed in April 2009.

What You Need to Know Concerning Payroll Deductions:

- If you are a **Donor:**
 - Retain a copy of your pledge card to substantiate your charitable donation, **OR**
 - Request a copy of your pledge card from your payroll office, **OR**
 - Request a confirmation letter from United Way. Please note that we will only be able to provide a letter of confirmation if we have received sufficient detail of your payroll pledge from your organization.
- If you are the company's **Payroll Contact:**
 - When you process employee payroll deductions, keep employee pledge cards on file as long as necessary, as employees may submit tax returns well after the April 15 filing deadline.
- If you are the company's **Campaign Coordinator:**
 - Be aware of how this affects donors at your company and where you will direct inquiries as they occur.
 - If your company uses an on-line giving tool, include this information on the tool and also send a gift confirmation e-mail advising employees to print and save for tax purposes.

Note: This information is not a comprehensive summary of the IRS's requirements. We recommend that each donor consult their tax advisor for more information about what they need, or visit www.irs.gov for complete information.