

How to Use the Record Keeping Sheets

Three complementary sheets capture every dollar — campaign totals, individual pledges, and special event proceeds. All three must be complete before submitting to UWNSV.

THE THREE DOCUMENTS AT A GLANCE

DOC 1

Handley_2026_Campaign_Record_Keeping

Tracks totals by payment method. Includes cash denomination count, check log, and Grand Total. Coordinator signs and submits this sheet.

DOC 2

Employee Donations tab

One row per employee — name, payment method, amount, and contact info. Grand Total here must match the Campaign Record Keeping sheet before submitting.

DOC 3

Handley_Event_Activity_Verification

Used for fundraiser proceeds only. Separate coin, bill, and check counts. One form per event or activity.

STEP-BY-STEP PROCESS

1

Collect pledges

Staff use the online form at bit.ly/Handley26 — payroll, card, or check

2

Log each donor

One row per person on Sheet 2 — name, method, amount

3

Count cash carefully

Fill in Sheet 1 cash section — bill by bill, coin by coin. Convert to check when possible.

4

Total Campaign Record Keeping

Add all methods — cash, check, card, payroll, events — into Grand Total

5

Sign and submit

Coordinator signs Campaign Record Keeping, attaches Employee Donations, submits both to UWNSV

PAYMENT METHOD ROWS

- **# of Investors** — how many people gave in each category
- **Pledge Amount** — total each donor committed to give
- **Amount Paid** — what has actually been collected so far
- **Balance Remaining** — auto-calculated: pledge minus paid (for payroll and direct bill)
- **Special Events** — separate line for fundraiser/event proceeds (use Sheet 3)
- **Grand Total** — auto-sum of all payment methods combined

CASH & CHECK SECTIONS

- **Cash denominations** — enter quantity of each bill and coin separately; amounts auto-calculate
- **Cash Subtotal** — auto-sums bills and coins separately, then combined
- **Check log** — list each check number and amount on its own line; total auto-calculates
- **Coordinator Signature** — sign and date at the bottom before submitting

REQUIRED FIELDS (EVERY ROW)

- **Name** — last name first (e.g., Doe, Jane)
- **Cash / Check / Direct Bill** — enter amount in the correct payment column only
- **Total Gift Amount** — auto-sums all payment columns for that donor; do not edit manually
- **Email Address** — used for pledge confirmation; enter n/a if unavailable
- **Anonymous (Y/N)** — if Y, name is not shared in public reports

OPTIONAL FIELDS & NOTES

- **Address / City / State / Zip / Phone** — only needed for non-payroll donors who want a receipt
- **Totals row** — auto-sums each column; verify this matches Sheet 1 Grand Total before submitting
- **Example rows** — rows 6-12 are samples. Delete them before submitting to UWNSV.
- **\$0 pledges** — if a donor pledged but has not yet paid, enter \$0.00 rather than leaving the cell empty
- **Stock, DAF, or other** — for stock gifts, donor-advised funds, or other giving vehicles, email Kwilt@unitedwaynsv.org directly to arrange

All pledge forms will be sent to you directly — please keep a copy for your records. If employees leave or are added during the campaign, please let us know at Kwilt@unitedwaynsv.org.

COUNTING CASH AND CHECKS — CAMPAIGN RECORD KEEPING

BILLS — ENTER QUANTITY

| | |
|-------------|--------------------|
| \$100 bills | <i>qty</i> × \$100 |
| \$50 bills | <i>qty</i> × \$50 |
| \$20 bills | <i>qty</i> × \$20 |
| \$10 bills | <i>qty</i> × \$10 |
| \$5 bills | <i>qty</i> × \$5 |
| \$2 bills | <i>qty</i> × \$2 |
| \$1 bills | <i>qty</i> × \$1 |

COINS — ENTER QUANTITY

| | |
|-------------|---------------------|
| Dollar coin | <i>qty</i> × \$1.00 |
| Half dollar | <i>qty</i> × \$0.50 |
| Quarter | <i>qty</i> × \$0.25 |
| Dime | <i>qty</i> × \$0.10 |
| Nickel | <i>qty</i> × \$0.05 |
| Penny | <i>qty</i> × \$0.01 |

Amounts auto-calculate. Only enter the quantity column.

CHECKS — LOG EACH ONE

Enter the check number and check amount on a separate line in the Check Log section. Do not combine multiple checks into one entry.

Make all checks payable to: **United Way of Northern Shenandoah Valley**

Check Total auto-calculates at the bottom of the log.

HANDLEY_EVENT_ACTIVITY_VERIFICATION — FIELD GUIDE

HEADER FIELDS

- **Event / Activity Name** — the name of the specific fundraiser or event
- **Date** — date the event was held
- **Coordinator** — name of the person running the event
- **Branch / Department** — which branch or team hosted the event

COUNTING SECTIONS

- **Coins section** — enter quantity for each denomination (penny through dollar coin); amounts auto-calculate
- **Bills section** — enter quantity for \$1 through \$100; amounts auto-calculate
- **Checks section** — log each check number and amount individually in rows provided
- **Total Donation** — auto-calculates coins + bills + checks; transfer this figure to Sheet 1, Special Events row

Use one Handley_Event_Activity_Verification sheet per event or fundraiser. Transfer the Total Donation figure to the Special Events / Fundraisers row in Handley_2026_Campaign_Record_Keeping when totaling the campaign.

COMMON MISTAKES TO AVOID

DO NOT LEAVE ROWS BLANK

If a donor gave \$0 (pledged but not yet paid), enter \$0.00 rather than leaving the cell empty. Blank cells make totals unreliable.

CONVERT CASH TO CHECK WHEN POSSIBLE

Convert cash to a check made payable to United Way of Northern Shenandoah Valley before submitting. It is faster, safer, and easier to track. Do not send cash without converting it first.

MATCH THE TWO DOCS

The Grand Total in Handley_2026_Campaign_Record_Keeping must equal the Totals row sum in the Employee Donations tab. If they do not match, find the discrepancy before submitting.

SEND YOUR CLOSE-OUT EMAIL

- **To** — Kwilt@unitedwaynsv.org (Kim Wilt)
- **CC** — agail@unitedwaynsv.org (Andy Gail)
- **Subject** — Handley Library 2026 Campaign — [Your Organization Name] Close-Out
- **In the email** — confirm your Grand Total and request a time to either have UWNSV collect the money or arrange a drop-off

MONEY COLLECTION OPTIONS

- **UWNSV picks up** — propose a date and time in your email; have all documents and checks ready
- **You drop off** — bring the full packet to UWNSV at 329 N. Cameron Street, Suite 201, Winchester, VA 22601
- **What to bring** — signed Campaign Record Keeping sheet, Employee Donations tab, all checks, and any Event Activity Verification sheets



Before submitting — checklist

Coordinator signs and dates Handley_2026_Campaign_Record_Keeping. Attach all checks, a copy of the Employee Donations tab, and any Event Activity Verification sheets. Submit the full packet to UWNSV. All pledges go through the online form at bit.ly/Handley26.

Campaign Record Keeping signed & dated

Employee Donations tab attached (example rows deleted)

Grand Totals match across both docs

All checks attached

Event Activity Verification sheets attached (if applicable)

Close-out email sent to Kim & Andy

Collection or drop-off scheduled

All pledges submitted at bit.ly/Handley26

Questions? Kim Wilt | Kwilt@unitedwaynsv.org | Andy Gail | agail@unitedwaynsv.org

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