

Quick Reference Guide to Campaign Reporting and Roles under Standards H and M and the NPC Policy for Reporting Total Resources Generated

Scenario	Include in Standardized Campaign Production Figure to UWA (UW1+UW2)?	Include in Audit as Gross Campaign "Results"?	Include in Audit as Campaign Revenue?	Under Standard M, who can charge:		Include in Local Annual Campaign Figure?
				Processing Fee	Fund Raising fee	
Pledges generated in workplace campaign in your United Way's solicitation area that your United Way manages and processes	Yes	Yes	Only undesignated gifts to your United Way are recorded as revenue. Designations are subtracted from gross campaign results to arrive at amount recorded as net campaign revenue.	Your United Way	Your United Way	<p>Local campaign results are generally determined locally. Be prepared to explain any variations between audited campaign numbers and amounts reported to the community and to UWA.</p> <p>BE VERY CLEAR about what is reported where and why.</p>
Pledges generated in workplace campaign in your United Way's solicitation area that your United Way manages but are processed by another party	Yes	Yes	Only undesignated gifts to your United Way are recorded as revenue. Designations are subtracted from gross campaign results to arrive at amount recorded as net campaign revenue.	Processor	Your United Way	
Campaign proceeds your United Way receives and those designated to member agencies/funded organizations paid through United Way that are generated in a workplace campaign in your United Way's solicitation area that your United Way does not manage and is processed by another party (e.g., electronic campaigns where there is little or no on-site campaign support as requested by the company)	Yes	Yes	Only undesignated gifts to your United Way are recorded as revenue. Designations are subtracted from gross campaign results to arrive at amount recorded as net campaign revenue.	Processor	Does not apply in this case	
Pledges generated in another United Way's territory where your United Way processes the campaign	No	No	No	Your United Way	<i>See Implementation Guidelines for Requirement M.</i>	
Pledges generated from combined government campaigns where your United Way is the PCFO	Yes	Yes	Only gifts to your United Way are recorded as revenue.	Not applicable. Fee reimbursement is dictated by relevant government regulations.		
Incoming transfers/designations from other United Ways to your United Way or to your member/funded agencies	No	No	No	The United Way that generated the gift may charge the fund raising fee and if it processes the campaign, a processing fee.		

Visit the CFO Deskbook on United Way Online for more details on the NPC Policy, Requirement M, and Requirement H (audited financial statements).

Location: http://online.unitedway.org/cfo_deskbook.