Campaign Closeout Checklist

Pledge Forms
- Donor’s name and address are clear and legible
- Correct number of pay periods is checked for payroll deduction
- Total gift amount is entered
- Pledge forms have been signed and dated by the donor
- Blue copy of pledge form is retained by the donor
- Yellow copy (Anchorage) or Pink copy (Statewide form) of pledge form is forwarded to your payroll office
- White copy of pledge form is placed in a Campaign Envelope
- Pledge forms are separated by work location/city and put into separate Campaign Envelopes

United Way E-Pledge (if applicable)
- Run a final United Way E-Pledge report for your accounting or payroll department

Campaign Envelopes
- **White**
  - Corporate Gift – complete if applicable
  - Special Events – enter total amount of enclosed CHECKS - NO CASH
  - Employee Gifts – enter separate dollar amount for each form of payment, check, direct bill / EFT, credit card or payroll deduction – NO CASH
  - Enclose completed pledge forms
  - Enclose a copy of the Donor Tracking Spreadsheet – if applicable

- **Green** – CASH ONLY
  - Please include any cash or coin with the corresponding completed pledge form
  - If using a separate envelope for special events please enclose a note identifying what type of special event (chili feed, auction, jeans day, etc...)
  - All cash should be counted and verified in the presence of a United Way staff member before the envelope is sealed
  - Please use a separate envelope for any cash raised through a raffle. Raffle monies must be tracked independently from employee pledges. See “Raffles, Auctions and Sweepstakes” on the Campaign Toolkit on the United Way website. [www.liveunitedance.org](http://www.liveunitedance.org)

Please return these items to your United Way of Anchorage contact
- Campaign envelopes
- Any unused campaign materials
- United Way recognition plaque, if applicable (campaigns over $10,000)
- Campaign Closeout Documents
  - Campaign Closeout Form
  - Payroll Deduction Form – may require assistance from your payroll contact
  - Corporate Contribution Form – may require assistance from company leadership