



United Way of Anchorage

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" in the Employee Campaign Coordinator Handbook for more information.

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