



United Way of Anchorage

## Campaign Closeout Checklist

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### 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