Campaign Wrap Up Checklist

Great job! You’re almost there!

- Make sure all donations and forms are complete and turned in
- Check forms to make sure they are filled out correctly
  - Look for signature, correct # of pay periods, total donation amount, credit card expiration date, etc.
- Schedule a wrap up meeting with your United Way rep
- Make copies of all payroll deduction forms for your HR department (Originals go to United Way)
- If you’re using a United Way workplace giving portal, ask your representative for your donation information
- Fill out the Campaign Wrap Up Sheet:
  - Update key contact information
  - Provide most recent employee count
  - Enter donation amounts as indicated
- Provide feedback about what worked well this year and what could be improved.
  - Ask your team for input
  - Brainstorm potential improvements and changes
  - Keep your brilliant ideas on hand for next year
- Announce your results and thank everyone
- Pat yourself on the back. 😊

Anything else you need? We’re here to help!

- __________________________________________________________
- __________________________________________________________

Thank you for your time and efforts. Your work makes a BIG difference!