

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!

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- _____

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