

Pledge Form Processing Checklist

Checking pledge forms for accuracy as they roll in will ensure that the accounting process runs smoothly – and more importantly, that donors are given appropriate credit and recognition for their contributions.

A. Pledge Forms

- Donor's address and social security and/or employee ID number are on each pledge form
- Payroll deduction donations have correct number of pay periods for your company
- Pledge forms have been signed and dated by the donor
- Blue copy of pledge form is given to the donor
- White copy of pledge form is forwarded to your payroll office

B. Accounting Sheets

- Accounting sheets are inside the envelopes and a copy also turned in to United Way Staff

C. Envelopes

White Envelopes:

- Corporate Gift information is filled in on White Envelope
- White envelopes contain any special event money that is paid with individual or company check. (No corresponding pledge forms for special event money needed)
- White envelopes contain ONLY check, direct bill, credit card, EFT, or payroll deduction pledge forms.
- Separate pledges by work location/city—place in separate envelopes**

Blue Envelopes:

- Blue envelopes contain cash or coin donation with an attached, corresponding pledge form. Please count in the presence of a United Way Staff Member or representative.
- Blue envelopes also contain special event money that is in cash form. (Although, we do suggest converting cash to a company check, payable to United Way.)
- Separate pledges by work location/city—place in separate envelopes**

D. Campaign Closeout Package

- Award Recognition Form is completed and turned into United Way Staff or LAM
- Payroll Deduction Disbursement Form is completed and turned into United Way Staff or LAM
- Corporate Gift Disbursement Form is completed and turned into United Way Staff or LAM
- Plaque is turned into United Way Staff or LAM
- Extra materials are returned to United Way