

UNITED WAY CAMPAIGN CHECKLIST



Every workplace campaign is different and can be shaped around your company's culture.

1 LEARN ABOUT UNITED WAY

Whether it's responding to a global pandemic or a personal crisis, United Way is helping people right here in south-central Kansas.

- Visit unitedwayplains.org/what-we-do to discover the many ways we're advancing the common good in the areas of health, education and financial stability.
- Have questions? Ask your United Way contact!

2 GET ORGANIZED

MEET WITH YOUR UNITED WAY CONTACT ___/___/___

- Discuss what your campaign will look like this year – education activities, solicitation methods, etc.
- Assist your United Way contact in scheduling a meeting with your CEO.
- Get supplies for your campaign - brochures, pledge cards and more!

SECURE SUPPORT FROM CEO ___/___/___

- Determine a corporate match and gift. Your United Way contact can help you with these asks.
- Form a budget for incentives, donor recognition and meeting refreshments.

RECRUIT A COMMITTEE ___/___/___

- Include representatives from each department.
- Assign roles and responsibilities.
- Educate your committee about United Way. Invite your United Way contact to speak with them.
- Schedule committee meetings and invite your United Way contact.

MAKE A PLAN ___/___/___

- Review your campaign history and set goals. Download the goal setting worksheet from the campaign toolkit. Your United Way contact can help you complete it. Share these goals with your CEO.
- Establish a timeline. Set dates for the kickoff meeting, leadership giving meeting(s), and celebration event.

PLEDGE OPTIONS ___/___/___

- Using paper pledge cards? Personalize them before your employee meetings. Your United Way contact can help.
- Interested in a digital pledge option? Explore ePledge with your United Way contact.

3 DESIGN YOUR CAMPAIGN

CRAFT COMPELLING ACTIVITIES ___/___/___

- Create a theme with activities and incentives. Download the campaign ideas handout to help you get started.

BUILD AWARENESS ___/___/___

- Ask your CEO to send an email to all staff about why your company supports the campaign.
- Announce campaign schedule and activities.

TOUR A UNITED WAY FUNDED CAUSE ___/___/___

Availability of tours will depend on the agency's COVID-19 policies.

- Ask your United Way contact to schedule a tour at a United Way funded cause.
- Invite employees to see firsthand how their gift to United Way makes an impact.

HOST A VOLUNTEER OPPORTUNITY ___/___/___

- There's no better way to learn what United Way does than to get hands on. Host a volunteer opportunity that engages employees in United Way's work in the community. *Can't leave your office? That's okay. We can bring a project to you.*

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4 ENGAGEMENT

HOST A CAMPAIGN MEETING ___/___/___

- Host a meeting and announce your goal. *Not gathering in person? Your United Way contact can help you plan a virtual meeting.*
- Sample agenda:
 - Welcome and endorsement - CEO
 - United Way presentation and video - United Way contact
 - Success story - employee or United Way funded partner (*optional*)
 - Pass out pledge cards/explain pledge process and announce incentives – Campaign Leader
 - Make the ask - United Way contact
 - Collect pledge cards - Campaign Leader
- Remember to take photos, post to social media and tag United Way of the Plains (@unitedwayplains on Facebook, Twitter, Instagram, LinkedIn, TikTok and YouTube).

ENCOURAGE GIVING ___/___/___

Contributing is a personal matter and should be kept confidential. Pressure to give is unacceptable.

- Offer incentives or matches to encourage participation or increased gifts.
- Promote the ease of giving through payroll deduction.
- Ask for pledge cards to be returned by a certain date. Send a reminder as the date nears.

HIGHLIGHT LEADERSHIP GIVING AND AFFINITY GROUPS ___/___/___

- Host special meeting(s) for employees to learn about leadership giving, and how they can engage with the work of United Way by joining Women United®, Young Leaders United or our new Always United group.
- Ask your United Way contact to schedule a volunteer to speak and make the ask.

FOLLOW UP ___/___/___

- Follow up with employees who did not return their pledge card.
- When meeting one-on-one, share why you give and how United Way meets local needs. If they have questions you can't answer, ask your United Way contact to help.

5 WRAP UP

CELEBRATE YOUR SUCCESS ___/___/___

- Announce your results and thank your donors. Every campaign is worth celebrating!
- Share the success of your campaign on social media. Be sure to include photos and to tag us in your photos.

SAY THANKS ___/___/___

- Thank your CEO and management for their support of the campaign.
- Recognize and thank donors and committee members. A note or treat left on their desk is a great way to let them know their support is appreciated.

REPORT YOUR RESULTS ___/___/___

- Complete your report envelope. Call your United Way contact to pick it up.
- Results are due Dec. 2. Return your envelope at this year's Drop Party! Your United Way contact will be in touch with more details.

REFLECT ON YOUR CAMPAIGN ___/___/___

- Jot down a few notes for next year's committee. What worked? What didn't?
- Document your budget, campaign results, those interested in volunteering and any feedback you received.

STAY INVOLVED ___/___/___

- Don't wait until next year's fundraising campaign to make an impact through United Way. Visit unitedwayplains.org/corporatehub for ways to engage your employees and strengthen your corporate social footprint throughout the year. Keep the momentum going!

UNITED WAY OF THE PLAINS

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