

CAMPAIGN CHECKLIST



United Way
of Northern Utah

1. PRE-CAMPAIGN

- ☐ Meet with your United Way Rep to discuss:
 - Last year's campaign successes and challenges
 - Brainstorm engagement ideas for this year's campaign
 - Set a new campaign goal
- ☐ Meet with your senior level staff to discuss:
 - The campaign goal
 - Incentives, events, and budget
 - How leadership will support the campaign
- ☐ Recruit a campaign committee to help you promote the campaign and execute campaign activities.
- ☐ Set a campaign timeline.
 - Invitations and other communications about the campaign, including frequency of reminders, and deadlines
 - Kickoff event
 - On-site or virtual tours of Community Schools and Partner Agencies to connect employees to the impact and importance of their donation (your United Way Rep can help arrange this for you)
 - Celebration event
- ☐ Review the United Way Online Toolkit to access any additional materials needed to support your campaign (i.e. posters, videos, brochures, email templates, etc).

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2. DURING CAMPAIGN

- ☐ Host a campaign kickoff event
 - Invite your United Way Rep and a speaker from a local nonprofit agency or program
 - Share your story. Why do you give?
 - Make it easy to give. Have paper pledge forms and QR codes available to donate online
- ☐ Communicate regularly to keep employees stay informed and excited about campaign
 - Publicize community facts and interim campaign results at meetings, through emails, social media, and your company intranet.
- ☐ Ensure that all employees have access to paper pledge forms, or know how to donate online.
- ☐ Hold special events, an agency tour/fair, and other activities. Share photos from your events on your company's social media and tag United Way of Northern Utah
- ☐ Ask everyone to donate, then ask again; frequently remind employees about the campaign goal and incentives.

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3. POST CAMPAIGN

- ☐ Collect Pledge Results
 - Paper pledge forms or downloaded online pledges
 - Submit pledge results and campaign report/survey to your United Way Rep
- ☐ Review campaign results with your leadership, committee members, and United Way Rep
- ☐ Announce results to all employees
- ☐ Thank all donors with a celebration event, letter or email from your leadership, or a visit from your United Way Rep.
- ☐ Send out the Post-Campaign Survey (found in the online toolkit) to all employees who participated.

4. ENGAGE YEAR ROUND

- ☐ Engage employees in Year of Action volunteer events and other volunteer projects throughout the year.
- ☐ Sign up for the monthly Corporate Connection Newsletter. Share the impact story provided with your team to help connect them to the impact being made by their donations.
- ☐ Engage with us through social media.