

CAMPAIGN CHECKLIST



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

1

LEARN ABOUT UNITED WAY

United Way tackles the most pressing needs facing our neighbors in Reno County in the areas of Education, Health, Financial Stability, and Disaster Recovery.

- Visit www.unitedwayofrenocounty.org. Learn about our mission, vision, and the work that's happening in the areas of education, health, financial stability, and disaster recovery.
- Have questions?** Ask your United Way representative.

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 on 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.
- Establish a timeline. Set dates for the kickoff meeting and celebration event.

PLEDGE OPTIONS __/__/__

- Using paper pledge cards? Personalize them before your employee meetings. We 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 get you 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 PARTNER __/__/__

- Ask your United Way contact to schedule a tour with a United Way funded partner.
- 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. Join us for Community Work Day on August 24th. Sign up on at www.UnitedWayofRenoCounty.org/events.



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
 - Subject matter expert - discusses the impact of funded programs and services in our community (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 Reno County (@unitedwayrenocounty)

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.

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.

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 www.unitedwayofrenocounty.org for ways to engage your employees and strengthen your corporate social footprint throughout the year. Keep the momentum going!


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