

CAMPAIGN CHECKLIST

BY FOLLOWING THESE STEPS TO INFORM, ASK AND THANK DONORS, YOU'LL BE ON YOUR WAY TO A GREAT CAMPAIGN.

☐ MEET WITH YOUR UNITED WAY REPRESENTATIVE TO DISCUSS:

- United Way's 10-year vision, **LIVE UNITED 2020**, and how to incorporate it into your campaign.
- Campaign kick off, other key dates and additional **LIVE UNITED 2020** partnership opportunities, such as a sponsorship (see our Corporate Partnership Package).
- Brainstorm around how to achieve 100% participation and increase your goal by 10%.
- Materials that will help you reach your goals—find samples on the Online Toolkit at campaign.uw-mc.org.
- Develop your year-round communication plan.

☐ ASK YOUR CEO/MANAGEMENT TO CONSIDER A CORPORATE GIFT AND ENCOURAGE CAMPAIGN PARTICIPATION.

☐ RECRUIT AND TRAIN YOUR UNITED WAY CAMPAIGN COMMITTEE.

- Review last year's campaign and any feedback you received as to what worked and what didn't.
- Establish your committee by recruiting from all facets and levels throughout your organization. Remember this is your "action team". People who volunteer are involved because they want to be and will lend "energy" to your campaign.
- Gain assistance from your United Way representative by inviting them to your meetings to help train your committee and plan activities.

☐ APPOINT A LEADERSHIP GIVING/TOCQUEVILLE CHAIR TO REQUEST GIFTS OF \$1,000 OR MORE.

☐ KICK OFF YOUR CAMPAIGN—AND MAKE IT FUN!

- Tie your campaign together with a theme (i.e. **LIVE UNITED/GIVE 110%**).
- Hold a kick-off event and invite everyone.
- Arrange for a United Way speaker to discuss **LIVE UNITED 2020**.
- Work with the public relations team at your organization to help get the word out about your organization's impact through United Way.
- Your United Way representative can also connect you with our communications team to coordinate media outreach, or directly contact United Way's Communications Director at 312.906.2231.
- Share **LIVE UNITED NEWS** and **CAMPAIGN LEADERS NEWS** post kick off and encourage co-workers to sign up for informative updates on how their gift is improving lives across Chicagoland.

☐ REMEMBER TO ASK EVERYONE INDIVIDUALLY TO MAKE A CONTRIBUTION TO UNITED WAY AND THANK THEM.

- The biggest reason people don't give is because they were never personally asked!
- Ask people to consider increasing their gift by 10%—ask those who gave \$500 or more in the past to consider a Leadership gift (\$1,000 and up) and current Leadership Givers to consider becoming a *Step Up Tocqueville* donor.
- Giving is a personal choice. If someone chooses not to give, please respect their decision.
- The best way to **THANK** donors is by showing them the impact they are making.
- Organize an end-of-campaign thank you event or send personalized United Way thank you cards.
- Recognize and thank donors on your organization's intranet site.

☐ INCORPORATE UNITED WAY VOLUNTEER AND ADVOCACY OPPORTUNITIES INTO YOUR CAMPAIGN.

TALK TO YOUR UNITED WAY REPRESENTATIVE TO GET STARTED!

>> CAMPAIGN CHECKLIST CONT'D.

- ❑ COMPLETE THE CAMPAIGN FINAL REPORT. THIS WILL ALLOW UNITED WAY TO THANK AND RECOGNIZE ALL DONORS AND CORPORATE PARTNERS.
- ❑ PARTICIPATE IN UNITED WAY'S AWARD PROGRAM.

CAMPAIGN BEST PRACTICES

- Work closely with your United Way representative at all stages of your campaign.
- Get help! Build your campaign committee to help you make the case for giving.
- Visit the Online Campaign Toolkit for the latest resources at campaign.uw-mc.org.
- Educate your colleagues about United Way.
- **GIVE** your gift. It's easier to ask other to **GIVE** and **LIVE UNITED** when you have already made a contribution.
- Involve your CEO/Senior Staff and ask them to **GIVE, ADVOCATE** and **VOLUNTEER** to show that your organization supports United Way from the top.
- Set goals and track results. Be sure your goals include components other than total dollars (i.e. participation, percentage of increase).
- Ask your organization leaders if they will provide a Matching Gift to stimulate employee giving.
- Ask your colleagues to increase their gift by 10%.
- Make contributing easy! Set up automatic payroll deductions using e-Way or e-Pledge.
- Establish a Leadership Giving (\$1,000 and above) and/or *Tocqueville Society* (\$10,000 and above) giving campaign. Work with your United Way representative to develop specific strategies for cultivating these larger gifts.
- Develop a skills-based volunteer program with United Way for your colleagues. They will experience first hand how their partnership with United Way is changing lives.
- Promote your United Way partnership on your organization's intranet, social media sites, newsletter, website, at staff meetings or on bulletin boards.
- Sponsor networking or fundraising events for our United Way *Young Leaders Society*, a group of emerging young professionals in our region.
- Loan an executive to United Way, as part of our *Loaned Executive* program, during our campaign season.
- Follow us on Facebook @unitedwaychicago and Twitter @unitedwaychi for up-to-the-minute news.
- Sponsor outdoor advertising (i.e. billboard and transit signage) that promotes your community investment in the work of United Way.