CAMPAIGN LEADER CHECKLIST

12 WEEKS
- Meet with previous campaign team to review successes and challenges
- Determine campaign dates, length, locations and fundraising goals
- Finalize campaign committee leaders and structure
- Choose Giving Society and Affinity Group Ambassadors
- Meet with your United Way representative to confirm dates, goals and annual objectives

9 WEEKS
- Develop theme and calendar of events
- Recruit additional campaign committee members
- Brief executive leadership on campaign key objectives
- Develop Giving Society strategy, identify prospects and set events
- Configure United Way eCampaign platform

6 WEEKS
- Develop communications plan and order campaign marketing materials through your United Way representative
- Visit the Campaign Toolkit at LIVEUNITEDchicago.org/Campaign-Toolkit to check out additional campaign resources
- Develop plan to host a Day of Caring and recruit volunteers. Learn more online at LIVEUNITEDchicago.org/Volunteer

4 WEEKS
- Train campaign volunteers and ambassadors. Your United Way representative can assist.
- Build excitement! Share United Way impact stories and videos on your intranet

2 WEEKS
- Share calendar of events with all staff
- Host Giving Society and Affinity Group events
- Ask ambassadors to follow up with prospects

KICKOFF!
- Host a kickoff event!
- Invite your CEO and United Way representative to talk about United Way’s impact
- Send a welcome eCampaign email

ONGOING
- Send daily campaign tracking reports
- Send eCampaign reminders
- Host business unit events and kickoffs to raise awareness and increase participation
- Continue sharing United Way impact stories
- Host a Day of Caring

AFTER YOUR CAMPAIGN
- Conduct a closeout meeting with your United Way representative
- Send out final campaign fundraising total
- Thank and show appreciation to employees

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United Way of Metro Chicago
5 STEPS TO RUNNING A SUCCESSFUL CAMPAIGN

1 | LEARN

Before planning, we want to understand you and your goals and tell you more about our impact.

- **Call your United Way representative to get started.** They will help you create and manage a successful campaign.
- If you don’t know who that is, contact us at 312.906.2350 or unitedwaymetrochicago@uw-mc.org.

2 | PLAN

The keys to campaign success are preparation and teamwork. Having the right team of campaign volunteers will increase the success of your campaign and make your role much easier.

- Set campaign goals, objectives and timeline.
- Identify and recruit your team.
- Learn about various strategies to make your campaign a success. **Call us, we have lots of ideas!**

3 | INSPIRE

United Way is engaged in innovative and impactful work across the region. Your campaign impacts real lives, and we can help you share those stories.

- **Promote your campaign.** Get your Marketing and Communications team involved! It may take more than an all-staff email.
- Help staff see the impact their gift creates by hosting a United Way Day of Caring or an onsite "kit" building event; or ask us about United Way Affinity Group opportunities.
- **Share your own personal story** about why you support United Way.

4 | ASK

The number one reason people don’t give is that they were never asked.

- **Kick off your campaign with a fun event featuring an energetic and inspiring ask to give!** Have your company CEO participate by writing a letter or making a speech.
- Emails work, but in-person is still the best way to ask for a gift. **Talk to us about asks that feel right for your team.**

5 | THANK

- **Let us help you thank your donors.** Remember, we can’t thank them if we don’t know them!
- **Review campaign results** with your United Way team.
- **Share the impact!** Publicize the campaign results in your company newsletter, intranet, social media channels or a message from the CEO.