

CAMPAIGN LEADER CHECKLIST



- 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



- 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



- 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



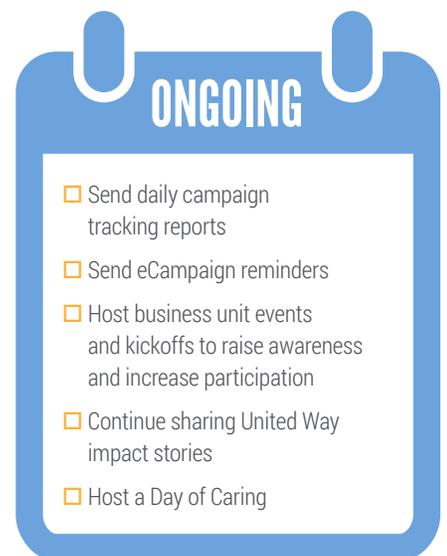
- Train campaign volunteers and ambassadors. Your United Way representative can assist.
- Build excitement! Share United Way impact stories and videos on your intranet



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



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



- 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

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.