



CAMPAIGN CHECKLIST





Denotes resources available at uwozarks.org/workplace-campaigns

✓ Plan your campaign

Target Date

Review the workplace campaign guidebook and online media toolkit.  Media Toolkit	
Meet with the United Way team to review last year's campaign, determine opportunities & challenges, and discuss strategies.	
Recruit a co-employee campaign manager or planning committee (if necessary).	
Set a monetary goal, determine incentives for giving and brainstorm special events. Meet with your organization's leadership to get his/her personal endorsement.	
Send a note from your organization's leadership to all employees endorsing and announcing the upcoming campaign.	
Promote your campaign! Get your team excited about your fundraising goal, and distribute your calendar of events. Utilize the online media toolkit to promote your campaign.  Media Toolkit	

✓ Execute your campaign

Host a virtual or in-person kickoff event. Invite the United Way team, and share your company's story...why do you give? Consider inviting retirees to this event.  Media Toolkit	
Find a creative way to recognize your leadership donors (\$500+). You can request a list of leadership donors from the United Way team.	
Make sure every employee has the opportunity to give. Provide employees with a paper pledge form, a link to your online campaign portal, and/or communication to rollover their pledge from last year.	
Throughout your campaign, host special events, lunch & learn sessions and other activities! The United Way team is available to help with these and provide ideas.	
Throughout the campaign, share your progress and participation on social media! Tag us  Media Toolkit @uwozarks. Use the online media toolkit to promote and share progress internally with your team.	

✓ Finalize your campaign

Collect pledges, calculate results and submit final report envelopes/spreadsheets to your United Way representative. Funds from all workplace campaigns should be turned in before March 31, 2024.	
Review campaign results with your committee members and United Way representative. Announce results to all employees.	
Thank all donors with a celebration event, and a letter/email from your organization's leadership.	



ACCESS THE ONLINE MEDIA TOOLKIT!

