

YOUR CAMPAIGN CHECKLIST

- Meet with your Donor Relations Representative from United Way of North Idaho.
- Attend Campaign Leader Training.
- Secure CEO/Senior Management endorsement.
- Recruit a campaign team comprised of representatives from all departments.
- Recruit a Leadership Giving (\$500+) representative or team.
- Review campaign history and set dollar, participation and awareness goals.
- Confirm campaign budget.
- Determine campaign theme, incentives, and promotion plan.
- Confirm dates and key details for your campaign kickoff and other important activities (time, location, speakers, food, activities, etc.)
- Schedule the use of the United Way of North Idaho campaign video.
- Share campaign details, including goals and strategies, with CEO and management.
- Conduct campaign team training in partnership with your UWNI staff.
- Identify prospective Leadership Giving contributors.
- Start Leadership Giving campaign.
- Prepare contribution forms and materials as needed.
- Begin promoting campaign at least 1 week before your kickoff.
- Campaign Kickoff. If an event, remember to take photos and share! We may choose to feature your company on the United Way of North Idaho's Facebook Page.
- Hand out pledge forms and provide information about giving. Get help from your campaign team!
- Schedule mid-campaign team meeting to review your results so far and finalize all remaining details.
- Send follow-up emails to remind employees about community needs and upcoming campaign activities. Find initiative facts, success stories, and other information at UnitedWayofNorthIdaho.org.
- Conduct rallies, group meetings and/or special events. Remember to include community speakers, interactive activities, games and/or prizes.
- Send a reminder about campaign close.
- Collect all contribution forms and submit report envelope(s), asking your Donor Relations Representative for help as needed.
- Remember to provide the names of your Leadership contributors so they can be recognized.
- Submit contribution forms/data to your human resources team.
- Remember to make your corporate gift. Our staff can help you identify customized giving opportunities that match your organization's charitable giving objectives. Ask UWNI staff for more information.
- Hold a celebration event to thank all employees and announce campaign results.
- Thank contributors, Leadership contributors, campaign team and any other key supporters and volunteers.
- Include campaign results and photos in your newsletter or on your website.
- Meet with your campaign team to collect feedback for next year.
- Select next year's Campaign Leader and kickoff date and provide information to UWNI staff.
- Provide feedback to UWNI staff and let us know how we can better help you!