

# CAMPAIGN CHECKLIST



Denotes resources available at  
OshkoshUnitedWay.org/Campaign-Resources

✓ Plan Your Campaign (8 Weeks)	Target Date
Review the previous campaign's performance, determine opportunities and challenges.	
Meet with your OAUW relationship manager to discuss campaign strategies, themes, and develop a calendar of events.	
Request materials & speakers through your OAUW relationship manager.  <b>Materials Request Form</b>	
Meet with your CEO, determine your participation and monetary goals, incentives for giving, and get his/her personal endorsement.  <b>CEO Checklist</b>	
Recruit a Co-Ambassador or Planning Committee (if necessary).	
Send a "Campaign Kickoff" letter from your CEO endorsing and announcing the upcoming campaign.  <b>Sample Communications</b>	
	Upload letter to intranet
	Invite retirees to your Kickoff Event
Promote your campaign and distribute your calendar of events.  <b>Fundraising Ideas</b>	
Visit the online <b>Toolkit</b> any time for campaign materials and ideas.	
Execute Your Campaign	
Hold Kickoff Event with OAUW representative.	
	Share your story. Why do you give?
Acknowledge your loyal contributors (5+, 10+ donors).	
Conduct special events, Lunch & Learn sessions, and other activities.	
 <b>Fundraising Ideas</b>	
	Share photos of persons participating in these events via your intranet and social
Make sure every employee receives a pledge form and has the opportunity to give.	
Publicize community facts and interim campaign results.	
Finalize Your Campaign	
Collect pledges, calculate results, and submit final report envelopes to your OAUW relationship manager.  <b>Report Envelope Instructions</b>	
Review campaign results with any co-ambassadors, committee members and OAUW relationship manager.	
Announce results to all employees and retirees.	
Thank all donors with a celebration event, letter, or email from your CEO or a visit from a United Way representative.	



# TIPS FOR A SUCCESSFUL CAMPAIGN

## Get Donors Interested

78% of people are more likely to give a financial donation if they first have a positive engagement experience.

- **Share the story:** Educate employees by inviting an agency speaker to share a story about the positive impact that donor dollars have in our community. Contact your OAUW relationship manager to schedule a speaker.
- **See impact in action:** Experience how important United Way-funded programs are to the community by touring an agency.
- **Volunteer during the Day of Caring:** Strengthen your team and community by participating in an annual volunteer project.

## Make the Ask

Research shows that the #1 reason people don't give to United Way is because they were never asked.

- **Ask for the pledge:** With new donors, ask for a first-time gift. For annual donors, thank them for their past support and encourage an increase.
- **Answer questions and handle concerns:** Answer questions honestly and if you don't know the answer, ask your United Way representative.
- **Leverage incentives:** Employee prizes and incentives are a way to reward employees for participating.
- **Say thank you:** Regardless of what the donor decides, thank them for their time.

## LIVE UNITED All Year Long

90% of businesses indicated that partnering with reputable nonprofit organizations enhances their brand.

- **Share facts and updates:** Send fun facts and stories via emails, newsletters, the intranet, or a bulletin board.
- **Connect on social media:** Advocate for United Way by posting photos of your employee volunteers in action or your special event.
- **Create an annual engagement calendar** that includes Lunch & Learn sessions, hosting a drive, agency site visits, and more. Contact your local United Way representative for more information.

## THE BEST WAY TO GIVE

A gift to Oshkosh Area United Way' allows you to help more people than a gift to a single nonprofit can.

United Way experts look for gaps and duplications so your dollars go to the needs everyone is aware of but also to those less obvious but no less important.

Your gift to Oshkosh Area United Way ensures that your donation is invested where the need is greatest. Donations are monitored to ensure the programs are effective, meet current community needs, and are financially stable and sustainable.

