

CAMPAIGN CHECKLIST



United Way of Idaho Falls
& Bonneville County

Three Weeks Prior Campaign

- Meet with your United Way representative over the phone or by video conference. (208) 522-2674.
- Meet with your company leadership to ask for support (top down campaigns have the best results)
- For larger organizations, build a team of campaign helpers (you might want more technically savvy people on your team to help facilitate online activities, presentations, meetings, and more. Pull in marketing and communications team members if you can to help craft your communications plan).
- Develop your campaign plan;
 - Determine your campaign dates. We recommend a two-week campaign period. Anytime from now through November, fall tends to be the best time.
 - Set your campaign goals (participation and donations).
 - Make a communication plan
 - What information will you use?
 - When will it be sent/shared?
 - Where will information be sent or displayed?
 - How will you deliver information and pledging opportunities?
 - Who will you share information about your organization's United Way of Idaho Falls and Bonneville County (all employees always, but maybe publically on your social media channels, or to your partners and vendors).
 - Order signs, posters, pledge forms, and other campaign materials from your United Way representative.
- NEW – Talk to your payroll department about roll-over pledging. If they can accommodate work with your United Way to put a roll-over plan in place. This is a proven best practice and one that you really should embrace.**
- Invite your United Way representative to do a quick online presentation about the intersection of community needs and United Way of Idaho Falls and Bonneville County's work during your organization's online meetings. We would love the chance to share stories and support YOUR United Way campaign efforts. We can call into any/all existing staff meetings or join a campaign specific meeting. Just invite us!
- Add some fun.** Just because the majority of your campaigning might be online doesn't mean it can't be fun and a great opportunity for employee moral building. We have suggestions and tools to help you with this.

During Your Campaign

- Bring the campaign to life in your physical work spaces – have our colorful promotional/educational posters, signage, and other displays installed on the day you kick off your campaign. Consider employee entry locations, lobbies, lunch rooms, common areas, cafeterias, and even restrooms!

- Day one, first thing in the morning: blast out an email or a quote from your CEO or highest ranking local leader kicking off your United Way of Idaho Falls and Bonneville County campaign, stating he/she made a gift with a “*Why I give*” statement, and encouraging all employees to give. Include a hotlink to your online giving portal, campaign dates and if you are hosting special online or in-person events now is a great time to include a schedule.
- Send out United Way of Idaho Falls and Bonneville County campaign email blasts throughout your campaign. You’ll have access to 5 campaign videos, United Way success stories, community needs details, and much more.
- For people who are physically in the office, be sure to have paper pledge forms available (we recommend putting them on desks the night before your kickoff with return instructions to avoid personal contact).
- Mid-campaign, share results to keep your team motivated! Consider some sort of challenge to get those that haven’t given yet motivated to give. If your goal is met, perhaps your CEO could dye their hair a crazy color, take a pie in the face, make a lip sync video for all employees to see, or walk through the office in a crazy get-up for those who are there!
- Campaign wind down time. Keep the energy high all the way through the last day of your campaign. Add a fun count down at the three days to go mark to encourage last minute donations.

Post Campaign

- Have your leader announce final results and thank all employees for participating. If they offered to do a crazy stunt if a goal was met, now is the time!
- Process pledges and donations
 - Collect all paper pledge forms from employees.
 - Give United Way copies of pledge forms and all cash and check donations.
 - **NEW** – this year we are offering contactless pledge delivery as well as traditional in-person pick-ups. Contact your United Way at 208-522-2674 for instructions.
 - Give your payroll department copies of all payroll deduction pledge forms.
- Thank all employees for giving.
- Pat yourself on the back for a job well done! Because of YOU and YOUR efforts low-income children and families in need all across our community will receive the support they need to have better lives. **Your Campaign Makes a BIG Impact in our Community!**

