

# United Way of Southwest Minnesota

## CAMPAIGN CHECKLIST

### Before the Campaign

- Meet with a United Way of Southwest Minnesota (UWSWMN) representative.
- Secure CEO/Senior Management support.
- Recruit a campaign committee to help with the campaign.
- Review campaign history and set your goals.
- Determine your campaign plan, timeframe and any incentives.
- Gather your campaign communications and any campaign materials. Visit UWSWMN website for a variety of resources! [Unitedwayswmn.org](http://Unitedwayswmn.org) – Campaign Toolkit – Ambassador Resources
- Schedule your kick-off, UWSWMN speaker and any special events.
- Promote the campaign with a campaign announcement.

### During the Campaign

- Distribute pledge forms (or online giving information depending on your workplace) and campaign materials to every employee.
- Promote the campaign, kick-off and special events through numerous channels.
- Hold a mid-campaign committee meeting to review the progress towards the goal.
- Send regular progress reports to employees.
- Follow-up with individuals who have yet to turn in their pledge form.
- Send reminders about campaign events, incentives and deadlines.
- Share photos and progress with UWSWMN.

### After the Campaign

- Collect all pledge forms and deliver them to UWSWMN, including an Workplace Campaign Report form with each submission of cash/checks/pledge forms.  
**NOTE: Employee pledge forms are a one-part form. You can either make a copy of the completed forms and bring those to the UWSWMN office (800 E Main St.), OR bring the original forms to our office and we will make copies for our records.**
- Send a thank you letter to everyone including the campaign committee and the CEO.
- Publish a short story with photo and the results of your campaign in the company newsletter or company intranet.
- Hold a post campaign committee meeting to evaluate the challenges and successes of the campaign. Keep the notes handy for next year!
- Talk to the UWSWMN team so that we can continue to improve our service.

### Year Round

- Keep employees updated on the year around activities of UWSWMN.**
- Promote volunteer opportunities to employees – click on the Volunteer tab on our webpage for opportunities throughout our service area!
- Use new hire packets to introduce new employees to the work of UWSWMN.
- Use retiree packets to keep outgoing employees engaged in the work of UWSWMN.

**Every Person.  
Every Community.**

**United Way  
of Southwest Minnesota**

