

CAMPAIGN WORKSHEET

United Way of Douglas & Pope Counties



PRE-CAMPAIGN

RECRUITMENT AND PLANNING

Member & roles: _____

Campaign start date: _____ Campaign end date: _____

Number of employees: _____

SET CLEAR GOALS

Total pledge last year: _____ This year's total pledge goal: _____

% Participation last year: _____ This year's % participation goal: _____

Average gift from last year: _____ This year's average gift goal: _____

PROMOTION & COMMUNICATION www.uwdp.org

- Print materials
- Employee Communication
- CEO Endorsement Letter(s)
- Event Postings
- Internal Promotions
- Volunteer Opportunities

DURING CAMPAIGN

CAMPAIGN EVENTS

Campaign Kickoff: _____ Date: _____

Additional events:

ASK! EDUCATION & SOLICIT CONTRIBUTIONS

United Way Presentation date(s)/location(s) and presenters: _____

POST-CAMPAIGN

WRAP IT UP AND SAY THANKS!

Campaign close event: _____

Thank you activities and/or events: _____

Remit campaign contributions & results to United Way by: _____

Please complete this form and return to Maria Haug at mhaug@uwdp.org.

MAKING THE ASK

Best Practices

United Way of Douglas
& Pope Counties



HERE ARE SOME TIPS AND TOOLS TO HELP YOU MAKE THE MOST OF YOUR FUNDRAISING ASK!

Invite United Way to present to your group

- Educate individuals about the critical need in the community
- Inspire the group with a story or an example of the impact created by investing in United Way
- Emphasize that gifts and generous acts of any amount make a difference. Explain how donations make a local impact.
- Thank them for their time
- Follow-up with donation links, upcoming events and volunteer opportunities

Materials include: [United Way PowerPoint](#), [United Way video](#), [United Way brochure](#), [United Way stories](#), [United Way pledge form \(www.uwdp.org\)](#)

Meeting face-to-face

- Ask about the causes and community passions that are close to the heart
- Explain how donations make a local impact
- Inspire with a story or an example of the impact created by investing in United Way
- Emphasize that gifts and generous acts of any amount make a difference.
- Be Prepared for a variety of responses:
 - If yes, be prepared to show how gifts can be made
 - If maybe or unsure, follow up later and answer any questions
 - If no, thank them, and do not push further
- Thank them for their time
- Follow-up with donation links, upcoming events and volunteer opportunities

Materials include: [United Way PowerPoint](#), [United Way brochure](#), [United Way stories](#), [United Way pledge form \(www.uwdp.org\)](#)

Communicating digitally

- Share videos, stories, and links to inspirational and informative content
- Personalize your message by sharing why you're involved
- Emphasize that gifts and generous acts of any amount make a difference.
- Thank them for their time
- Include donation links, upcoming events and volunteer opportunities.

Materials include: [United Way videos](#), [United Way stories](#), [United Way pledge form](#), [United Way brochure \(www.uwdp.org\)](#)

11 STEPS

For a Successful Campaign

United Way of Douglas
& Pope Counties



1. GET STARTED EARLY

2. OBTAIN CEO/MANAGEMENT INVOLVEMENT

Visit www.uwdp.org to see a sample letter!

3. BUILD A STRONG CAMPAIGN COMMITTEE

Members from various levels and departments across the company are represented.

4. DEVELOP A PLAN & SET A GOAL

Use your “Campaign Worksheet” as your guide!

5. BUILD MOMENTUM LEADING UP TO THE CAMPAIGN

Promote campaign activities and incentives within your workplace!

6. LAUNCH THE CAMPAIGN

7. USE INCENTIVES & FUN IDEAS TO ENCOURAGE PARTICIPATION

View or flipbook for examples and fun ideas!

8. MAKE THE ASK

Whether you invite United Way to present to your group, meet face-to-face with employees or communicate digitally – we can help! Read: “Making the Ask – Best Practices”

9. SAY THANK YOU!

Share your results with employees! Invite us to a staff meeting to help us echo your “thank you!” and celebrate your success with a “big check” photo.

10. EVALUATE YOUR EFFORTS

11. COMMUNICATE ALL YEAR LONG

Share our newsletters, event flyers and volunteer opportunities within your workplace!