



## 2023 / 2024 ANNUAL CAMPAIGN CHECKLIST

Thank you for taking on the important role of coordinating the United Way campaign at your workplace. You truly embody the “Live United” spirit, and your efforts will positively impact thousands of North Country residents! The following checklist is designed to help you coordinate a successful campaign. Please do not hesitate to reach out with any questions.

- Review all campaign materials. Reach out to United Way staff for additional copies or to customize materials.
- Set a goal! United Way can help you set a reasonable, achievable goal based on past campaigns. Promote the goal to your colleagues.
- Please coordinate with payroll staff to identify an appropriate wrap-up date that allows payroll deductions to begin on January 1, 2024. Generally, we recommend closing out your campaign in early December.
- Mark your calendar with important dates to include the campaign kick-off and wrap-up, along with any events, meetings, special initiatives along the way.
- Share campaign materials. Display posters. Distribute pledge forms (available in hard copy, electronic fillable form or via the pledge portal customized to your workplace). Consider sending a personalized message, along with updates on your progress toward the goal.
- Invite United Way staff to make a campaign presentation during a staff meeting, in-person or virtual.
- Consider making your own gift to lead by example and share with your colleagues your inspiration for giving.
- Incorporate a fun event or theme day as part of your campaign. Need ideas? Check out the handy dandy handout entitled “10 Fun Ways to Raise Funds and Support Your United Way Campaign” or call us to brainstorm.
- Above all else, tap into your creativity, have fun, and make this campaign your own! When you’re ready to wrap up your campaign, refer to the checklist on the back.

Questions? Reach out to us at (315) 788-5631 or [dawn.cole@unitedway-nny.org](mailto:dawn.cole@unitedway-nny.org)

Can’t find a particular campaign document? No worries. Check out the campaign toolkit at: <https://www.unitedway-nny.org/campaign-toolkit/>



## 2023 / 2024 ANNUAL CAMPAIGN WRAP-UP

You did it! Congratulations! Thank you for your support and leadership of the United Way campaign in your workplace

The following checklist is designed to help you wrap up your campaign. Please do not hesitate to reach out with any questions.

- Review all received pledge cards to ensure each one is correctly filled out with the donor's information.
- For donors using PAYROLL DEDUCTION, remove the perforated bottom of the pledge card and give to Human Resources or Administration as appropriate.
- If you are using the online pledge portal, please make sure that all records are highlighted in green (which means the pledges are confirmed). You may generate your campaign report from the portal and add your paper pledge totals.
- Complete the 2023 Campaign Report. Print and place in the enclosed envelope, along with paper pledge forms, checks and any currency collected during the campaign.
- Mail the campaign envelope to the United Way office at the address below or coordinate with United Way staff for pick up.
- Last but most definitely not least, pat yourself on the back for a job well done and know that you made a difference in the community!

United Way of Northern New York, Inc.  
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*Thank you for your support and leadership!*