

CAMPAIGN CHECKLIST

Use this checklist to keep you and your team on track through your campaign!

1. ENERGIZE

- ☐ Meet with your CEO/top leaders to confirm commitment and to engage employees.
- ☐ Recruit a committee to help with specific campaign tasks and special events.
- ☐ Schedule a planning meeting with your United Way representative to train you and your campaign committee and plan for your campaign.
- ☐ Establish your campaign timeline, including kickoff date, special events and finale or thank you event.
- ☐ Establish your campaign goals.
- ☐ Determine the type of ask that best fits your organization.
- ☐ Work with your United Way representative to setup your e-pledge giving page.

2. INSPIRE

- ☐ Set up a time for a United Way representative to come talk to employees.
- ☐ Share videos and stories featuring those impacted by United Way.
- ☐ Send daily or weekly emails to employees to keep everyone informed of the good work that United Way does in the community as well as your campaign progress.

3. ENGAGE

- ☐ Host campaign activities.
- ☐ Attend and invite your colleagues to attend the United Way Events.
- ☐ Kick off your campaign with a celebration.
- ☐ Share the impact and benefits of leadership giving and company campaign awards.
- ☐ Publicize and continuously promote your campaign and your goals to all employees.

4. ASK

- ☐ Ask people one-on-one to support United Way.
- ☐ Ask your company leadership to attend meetings or events.

5. THANK

- ☐ Announce your campaign results to your company.
- ☐ Thank your committee, volunteers and employees for their participation.
- ☐ Consider having a Thank You or Finale event.

HOW TO REPORT RESULTS:

- Work with your United Way representative to collect and close on all pledge card data, payroll summary data, and corporate pledge data.
- Turn in any physical pledge cards with the campaign report envelope to your United Way representative. Please provide donor contact information so we can properly express our thanks.
- Submit your final donor pledge summary report to your HR team or payroll department.