

WORKPLACE CAMPAIGN CHECKLISTS

| <input checked="" type="checkbox"/> Before the Campaign | Target Date |
|---|-------------|
| <input type="checkbox"/> Attend United Way ambassador training. | |
| <input type="checkbox"/> Secure CEO/senior management support. | |
| <input type="checkbox"/> Determine your participation goal, monetary goal, and incentives. | |
| <input type="checkbox"/> Recruit a team to help with the campaign; assign tasks. | |
| <input type="checkbox"/> Meet with your loaned executive to discuss campaign strategies and develop a calendar of events. | |
| <input type="checkbox"/> Review the previous campaign's performance, opportunities, and challenges. | |
| <input type="checkbox"/> Determine your campaign plan and time frame. | |
| <input type="checkbox"/> Schedule your kickoff, United Way speaker, and any special events. | |
| <input type="checkbox"/> Promote the campaign and distribute your calendar of events. | |
| <input type="checkbox"/> Send a campaign kickoff letter from your CEO endorsing the campaign. | |
| <input type="checkbox"/> Invite retirees to your kickoff event. | |

| <input checked="" type="checkbox"/> During the Campaign | Target Date |
|---|-------------|
| <input type="checkbox"/> Hold kickoff event with loaned executive and agency speaker. | |
| <input type="checkbox"/> Ensure all employees have access to campaign materials and giving platforms. | |
| <input type="checkbox"/> Hold a leadership giving or loyal contributor (10+ year donors) event. | |
| <input type="checkbox"/> Keep the campaign alive by sharing success stories, community facts, and photos via your intranet. | |
| <input type="checkbox"/> Conduct special events, lunch and learn sessions, and other activities. | |
| <input type="checkbox"/> Monitor your progress towards your goal. | |
| <input type="checkbox"/> Remind individuals who have not pledged to consider making a gift. | |
| <input type="checkbox"/> Send reminders about campaign events, incentives, and deadlines. | |

| <input checked="" type="checkbox"/> After the Campaign | Target Date |
|---|-------------|
| <input type="checkbox"/> Ensure all pledges are received. | |
| <input type="checkbox"/> Follow up on any corporate contribution or employee match. | |
| <input type="checkbox"/> Calculate the results, review results with your committee members, and prepare final report for your United Way contact. | |
| <input type="checkbox"/> Announce results to all employees. | |
| <input type="checkbox"/> Post campaign photos on your corporate social media networks. | |
| <input type="checkbox"/> Evaluate the challenges and successes of your campaign. Keep the notes handy for next year. | |
| <input type="checkbox"/> Thank all donors with a celebration event, letter, or email from your CEO and a presentation from a United Way representative. | |

| <input checked="" type="checkbox"/> Throughout the Year | Target Date |
|---|-------------|
| <input type="checkbox"/> Keep employees updated on United Way activities. | |
| <input type="checkbox"/> Promote volunteer opportunities. | |



@unitedwayyuma