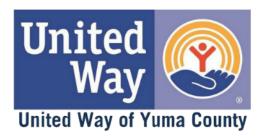
WORKPLACE CAMPAIGN CHECKLISTS

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

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

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











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