

CAMPAIGN CHECKLIST



United Way
of the Midlands

1. RECRUIT A TEAM

- Attend United Way Campaign Director (CD) training
- Meet with United Way campaign staff to review prior year's giving (United Way campaign staff will provide this for you) and develop a campaign strategy
- Meet with your CEO to confirm commitment and buy-in to engage employees
- Recruit a committee to help with specific campaign tasks
- Schedule an internal training for your team
- Schedule a United Way meeting with your staff contact
- Attend United Way Community Kickoff

2. SET A GOAL

- Establish your campaign goals - total dollars raised, percent participation, special events, etc.

3. DETERMINE YOUR TIMELINE

- Establish your campaign timeline, including a kickoff date, special events and finale or thank you event

4. PLAN CAMPAIGN ACTIVITIES

- Draft a letter to be sent from the CEO to thank employees - see our examples online for help
- Kick off your campaign with a celebration
- Schedule employee meetings and invite United Way staff
- Personalize your campaign
- Determine the type of ask that best fits your organization's culture

5. INFORM AND ASK

- Publicize and continuously promote your campaign and your goals to all employees
- Conduct a leadership giving campaign
- Follow up with employees who are unable to attend meetings
- Issue progress reports to United Way and your fellow employees

6. THANK EVERYONE

- Announce your results
- Thank your committee, volunteers and employees for their participation
- Have a celebratory Thank You or Finale event

7. REPORT RESULTS

- Add up your results and submit report envelope and required forms to United Way
- Evaluate your company's campaign strengths and weaknesses and make recommendations for next year's campaign

8. STAY IN TOUCH

- Pat yourself on the back for a job well done!
- Attend the United Way Campaign Finale and be recognized for your hard work