

UNITED WAY 2009

Campaign Checklist

Before the Campaign

- Meet with your United Way representative.
- Attend Employee Campaign Coordinator training.
- Secure CEO/Senior Management endorsement.
- Review campaign history and set dollar, participation and awareness goals.
- Confirm campaign budget.
- Recruit a campaign team comprised of representatives from all departments and retiree groups.
- Conduct a team training in partnership with your United Way representative.
- Recruit a Leadership Giving Chairperson.
- Determine campaign theme, incentives, and promotion plan.
- Establish a timeline for kick-off and activities.
- Finalize campaign communication strategy and order campaign materials.
- Schedule United Way Community Speakers.

During the Campaign

- Start Leadership Giving campaign.
- Prepare personalized contribution forms and materials as needed.
- Begin promoting the campaign a least one week before the kick-off.
- Campaign kick-off celebration – remember to take photos and include employee meetings.
- Hand out contribution forms or provide information about online giving.
- Schedule mid-campaign team meeting to review results so far and finalize remaining details.
- Include your United Way Representative in progress reports and use them as a resource.
- Send follow-up emails to remind employees about community needs and upcoming campaign activities.
- Conduct rallies, group meetings, and/or special events. Include United Way Community Speakers, activities, games and/or prizes.
- Send a reminder about the campaign close.

After the Campaign

- Collect all contribution forms and submit report envelopes to United Way representative.
- Remember to make your corporate gift and/or match.
- Thank your committee, campaigners, and employees who participated.
- Draft a letter to be sent from the CEO to thank employees for their contributions.
- Include campaign photos and results in your newsletter, website or intranet.
- Evaluate your organization's campaign strengths and weaknesses and make recommendations for next year's campaign coordinator.
- Provide feedback to your United Way representative so we know how to serve you better.

Ongoing

- Keep employees informed about how their support is achieving measurable results by subscribing to United Way's newsletter.
- Plan other year-round community education or volunteer activities.