

➤ CAMPAIGN TIMELINE AND CHECKLIST

6 Weeks Before

4 Weeks Before

2 Weeks Before

Kickoff Celebration!

After Your Campaign

Target Date:

- Meet with your Loaned Employee to develop campaign goals and strategies.
- Review the previous campaign's performance, determine opportunities and challenges.
- Recruit and train a campaign team.
- Attend the Employee Campaign Coordinator Training hosted by United Way.
- Develop your campaign timeline with dates and goals.
- Meet with your CEO to confirm his or her commitment.
- Visit our online campaign toolbox for tools and ideas.

Target Date:

- Plan your campaign theme and special events.
- Set dates for employee meetings and agency tours.
- Ask your Loaned Employee about speakers for employee meetings.
- Request materials from your Loaned Employee. Everyone should receive pledge forms and brochures.
- Personalize pledge forms with contact information and prior year giving information for each employee.

Target Date:

- Promote your campaign special events and meetings.
- Conduct a Leadership Giving campaign, one of the best ways to increase the success of your overall campaign.
- Send communications from the CEO endorsing/announcing campaign.

Target Date:

- Kick off your campaign group meetings.
- Make sure that every employee receives materials and has the opportunity to give.
- Conduct special events and activities.
- Publicize interim campaign results.
- Send follow-up emails every few days to keep up the enthusiasm and build awareness. Include community facts and success stories.
- Have Fun!

Target Date:

- Wrap up campaign and collect all pledges. Follow up with those who did not turn in pledge forms.
- Tabulate the results and submit campaign reports to United Way.
- Announce campaign results to your staff.
- Thank all contributors with a celebration event, letter, e-mail, etc.
- Conduct a campaign debriefing with your team and Loaned Employee and develop a written summary for next year.

