

CAMPAIGN TIMELINE AND CHECKLIST

6 Weeks Before

- Review the previous campaign's performance, determine opportunities and challenges
- Meet with your CEO to confirm his or her commitment
- Recruit and train a campaign team
- Meet with your United Way representative to develop campaign goals and strategies
- Develop campaign timeline with dates and goals
- Visit United Way's online campaign toolkit for materials and ideas

4 Weeks Before

- Plan your campaign theme and special events
- Set dates for employee meetings and special events
- Ask your United Way representative about speakers for employee meetings
- Request materials, including pledge forms and brochures for all employees
- Personalize pledge forms with contact information and prior year giving information for each employee – United Way can help with this much easier this year!

2 Weeks Before

- 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 and announcing the campaign – be sure to see the samples available on our website

Kickoff Celebration

- Launch your campaign group meetings
- Make sure every employee receives materials and has an opportunity to give
- Conduct special events and activities
- Publicize interim campaign results
- Send follow-up emails every few days to keep up enthusiasm and build awareness; include community facts and success stories
- Have fun!

After Your Campaign

- Wrap up campaign, collect all pledges and follow up with those who did not turn in pledge forms
- Calculate results and submit final reports to United Way
- Announce results to your staff
- Thank all contributors with a celebration event, letter, email or visit from a United Way representative
- Conduct a campaign debrief with your team and Loaned Executive, and develop a written summary for next year

Find campaign resources at:

www.unitedwaynci.org/campaigntoolkit