

**UNITED WE FIGHT.
UNITED WE WIN.**

LIVE UNITED

Campaign Checklist 6-Week Timeline

Six Weeks Before Kickoff	Target Date	Completed
Meet with your Loaned Executive or United Way campaign staff to review past performance, changes this year, and identify opportunities.		<input type="checkbox"/>
Meet with your CEO and/or Senior Leadership to confirm their commitment, confirm goal, confirm incentives, and confirm Corporate Gift.		<input type="checkbox"/>
Attend Employee Campaign Coordinator Orientation at United Way.		<input type="checkbox"/>
Recruit a Co-Ambassador or Planning Committee (if necessary)		<input type="checkbox"/>
Develop your campaign timeline with dates & goals.		<input type="checkbox"/>
Five Weeks Before Kickoff	Target Date	Completed
Train & engage a campaign committee.		<input type="checkbox"/>
Connect with a Donor Network (Leaders Guild) Member at your workplace to secure help in soliciting other senior leadership as part of a leadership giving campaign before your kickoff.		<input type="checkbox"/>
Four Weeks Before Kickoff	Target Date	Completed
Plan your campaign theme & special events.		<input type="checkbox"/>
Visit our Campaign Toolkit online for ideas. Request materials from United Way. Everyone should receive pledge forms & brochures.		<input type="checkbox"/>
Set date(s) for employee meeting(s).		<input type="checkbox"/>
Request United Way and agency speakers for a campaign presentation.		<input type="checkbox"/>
Personalize pledge forms with individual's contact information, if desired.		<input type="checkbox"/>
Consider incorporating a volunteer opportunity into your campaign		<input type="checkbox"/>
Three Weeks Before Kickoff	Target Date	Completed
Prepare CEO endorsement letter and/or email		<input type="checkbox"/>
Personalize pledge forms with individual's contact information, if desired.		<input type="checkbox"/>
Prepare communications for leadership giving campaign.		<input type="checkbox"/>
Two Weeks Before Kickoff	Target Date	Completed
Announce and promote your campaign kickoff, special events & meetings. Distribute calendar of events.		<input type="checkbox"/>
Conduct a Leadership Giving campaign. It's one of the best ways to increase the success of your overall campaign.		<input type="checkbox"/>
Invite Retirees to your Kickoff Event		<input type="checkbox"/>

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One Week Before Kickoff	Target Date	Completed
Send pre-campaign email		<input type="checkbox"/>
Send CEO Endorsement. Announce company goals.		<input type="checkbox"/>
Kickoff & Campaign Weeks	Target Date	Completed
Kick off your campaign with an employee meeting and invite United Way for a campaign presentation. <ul style="list-style-type: none"> • Share your story...why do you give? • Hold a Leadership Giving, Retiree, and/or Loyal Contributor event • Conduct special events, Lunch & Learn sessions and other activities 		<input type="checkbox"/>
Make sure that every employee receives materials, including a pledge form & has the opportunity to give.		<input type="checkbox"/>
Send kickoff email to employees announcing campaign, goals, etc. (see campaign toolkit for samples).		<input type="checkbox"/>
Acknowledge your Loyal Contributors (10+ year donors)		<input type="checkbox"/>
Send follow-up e-mails every few days to keep up the enthusiasm & build awareness. Include community facts & success stories.		<input type="checkbox"/>
Publicize community facts and interim campaign results		<input type="checkbox"/>
Share photos of persons participating in these events via your intranet		<input type="checkbox"/>
One Week After Kickoff	Target Date	Completed
Collect Pledge forms, calculate results. Have donors keep pink & send white to HR.		<input type="checkbox"/>
Send Thank you email, including opportunity to turn in forms not submitted		<input type="checkbox"/>
Send CEO thank you email.		<input type="checkbox"/>
Send leadership giving Thank You email		<input type="checkbox"/>
Collect Corporate Gift Pledge Form		<input type="checkbox"/>
Review campaign results with your Committee members and Loaned Executive.		<input type="checkbox"/>
Thank all donors with a celebration event, letter or email from your CEO or a visit from a United Way representative.		<input type="checkbox"/>
Send follow up email, promote Make Your Moments Incentive, still time to turn in pledge		<input type="checkbox"/>
Two Weeks After Kickoff	Target Date	Completed
Total the results on the campaign report envelope & submit along with the yellow pledge forms & the Corporate Gift to United Way.		<input type="checkbox"/>
Send Follow Up Email		<input type="checkbox"/>