

Campaign Checklist

Pre-Campaign

- Review past performance, determining strength and weakness of previous campaign
- Attend ECC training
- Meet with your United Way representative to develop campaign goals and strategies
- Meet with your CEO to confirm his or her commitment
- Recruit and train a campaign team
- Develop a theme
- Set dates for employee meetings and agency tours
- Personalize pledge forms
- Develop an incentive program
- Send communications from CEO endorsing/announcing campaign
- Publicize the campaign
- Plan leadership event
- Meet with Human Resources to discuss Retiree Program and New Hire Program
- Establish a Loyal Donor Program

Campaign

- Complete leadership event prior to kickoff
- Kick off your campaign group meetings
- Publicize interim campaign reports
- Wrap up campaign, complete contacts, and account for all pledges

Post Campaign

- Request New Hires packet (Pledge Form and Brochure) and give to Human Resources Department for employees hired after the campaign
- Tabulate the results and submit campaign reports to United Way
- Give payroll deduction forms to payroll department
- Publicize campaign results
- Conduct a “thank you” program for all contributors
- Conduct campaign evaluation with your team and develop a written summary for next year.