

# CHECKLIST FOR A SUCCESSFUL CAMPAIGN

## 1. Prepare Your Campaign Timetable

- Meet with your CEO to develop a campaign strategy, establish a budget, set a stretch goal and present a timetable
- Recruit a campaign committee, including a Labor representative, if applicable
- Attend Employee Campaign Manager training and include your committee members
- Meet with your Campaign Executive (CE) or Donor Relations Manager
- Evaluate last year's campaign results and methods

## 2. Take Action

- Solicit incentive items and door prizes
- Print in-house campaign materials and use free United Way materials to publicize your campaign
- Consult your payroll department about payroll deduction procedures, if not already in place
- Print employees' names on pledge forms. Ask your CE to help get it done!
- Develop a CEO letter/email of support for all employees (or use United Way's sample letter online or on the CD)
- Request United Way speakers with 1-2 weeks notice
- Schedule LIVE UNITED Leaders presentation(s)
- Schedule employee presentation meetings on company time so all employees can attend
- Reserve rooms and plan refreshments

## 3. Run Your Campaign

- Send a CEO letter/email to employees with a campaign endorsement, meeting and event schedule
- Publicize United Way through all of your communication channels (email, posters, voicemail, intranet, etc.)
- Kick-off your campaign with a fun event. The more publicity, the better! United Way has music, videos, balloons, etc.
- Hold employee meetings and collect and tabulate pledge forms. Follow up with employees who have not turned in their pledge forms (they don't have to give, just turn in their form)

## 4. Wrap up Your Campaign Promptly

- Make a copy of all payroll deduction forms and send to your payroll office. Call your CE to pick up original copies of pledge forms and fill out the gift intake form with your CE. Meet with your CE to discuss lessons learned.
- Report final employee/corporate gifts to your CEO and to United Way
- Announce your campaign results to employees
- Send thank you messages to donors and committee members
- Attend United Way's Community Caring Celebration in March 2013. United Way wants to thank you!