

# Campaign Timeline & Checklist

## 4-6 weeks prior to campaign

- Determine when your kickoff will be and plan campaign accordingly.
- Meet with CEO or senior manager.
  - Secure their financial support of the campaign.
  - Ask for their support in organizing meetings.
  - Determine budget, if applicable, for incentives and/or thank-you gifts.
  - Ask them to draft a letter or e-mail supporting the campaign.
  - Organize a special presentation, if applicable, for your organization's leadership so they may take the initiative in showing support.
- Recruit a co-worker(s) to help you in the campaign effort.

## 2-3 weeks prior to campaign

- Hold regular campaign meetings to discuss goals, strategies, length of the campaign.
- Release lead letters or e-mail from CEO to every employee.
- Begin soliciting Leaders' Circle and Emerging Leaders donors.
- Plan a kickoff event.
- Promote the campaign with information about meetings, how and when to pledge, and stories about the lives United Way improves in the community.

## Campaign time

- Hand deliver pledge cards, incentive forms, and brochures to all employees.
- Hold employee meeting(s) and invite United Way to present and show the campaign video.
- Communicate throughout the campaign with **thanks**, information, and campaign updates.

## End of campaign

- Follow up with employees who have not given yet to ensure everyone had the opportunity.
- Decide on a way to **thank** employees for participating. Consider holding a **thank-you** event.
- Report results to United Way.
- Hold wrap-up meeting with campaign team to discuss results, lessons learned and recommendations for next year.
- Plan to bring your team to the community-wide finale celebration in February 2017!
- Think about participating in the Day of Caring Volunteer Event in the Spring of 2017.
- Congratulate yourself for a job well done!**