

## Pre-Campaign Checklist

- ☐ **Identify who will be helping with the United Way Campaign** (Depending on the size of your company, we recommend a committee of 3 to help facilitate the campaign. Think about different sites or divisions and having a representative for each of these.)
- ☐ **Pick your Campaign Date(s)**, We recommend a one week campaign for most companies.
- ☐ **Display any marketing materials.**
- ☐ **Get CEO Buy In-** It is important to have strong visible CEO support. Ask your CEO and/or Department Heads to endorse the campaign through letters, emails, and participation. The CEO Endorsement Letter in the toolkit is a customizable template provided by United Way marketing to show your CEO's support.
- ☐ **Send out Pre-Campaign Email to staff announcing the dates of your United Way campaign.**

## Campaign Closeout Checklist

- ☐ Collect pledge cards and hold drawings and giveaways for participating employees.
- ☐ Make copies of all Pledge Cards and Designation Forms.
- ☐ Give the originals to HR/Payroll and keep the copies to put in the United Way Report Envelope.
- ☐ Make final updates on the Roster of Givers and use this spreadsheet to help you calculate totals for the United Way Report Envelope.
- ☐ Fill out the United Way Report Envelope (**reference the instructions on the envelope for guidance**) and place the copies of pledge cards and designation forms, and all checks and cash in the report envelope.
- ☐ Call or email your United Way liaison to let them know that your campaign is complete. They will come pick up the envelope from you.
- ☐ Send Thank You Email to all employees!