

Campaign Planning Check List

Whether this is your first time managing a United Way Campaign, or you are a seasoned volunteer, this checklist will help you plan a successful workplace campaign.

1-2 months before campaign

- Reach out to your United Way representative to start planning special events, and set campaign dates!
- Set a goal for the Campaign - Check out the online Tool Kit for a Goal Planning worksheet.
- Create and meet with Campaign Planning Committee and meet throughout the campaign.
- WANT A VIRTUAL & ENVIRONMENTALLY FRIENDLY OPTION? Ask your United Way representative how to host a paperless e-pledge campaign.

1 month- 2 weeks before Campaign

- Set up some dates to bring in the United Way staff to present to your workplace about how we are addressing the largest community needs.
- Your United Way representative will drop off campaign materials at your convenience.
- Don't forget to send your United Way representative e-Pledge information if hosting a paperless campaign!

Week of Campaign Start

- Start your campaign off right, and send out a Campaign Kick-Off Email.

During Campaign

- Keep your employees engaged with special events – ideas below!
- PRO TIP: Ask your United Way Representative to attend your event, we would love to join you and answer questions about how your campaign impacts our community.
- Remind your employees about the campaign- Check out our online Campaign Tool Kit for all of our email scripts.

1-2 Weeks After Campaign

- PRO TIP: Send a thank you email to your employees & volunteers.
- Let your United Way representative know that you have paper pledge forms, cash, or checks to pick up.