

CAMPAIGN TIMELINE & CHECKLIST

Six Weeks Before Kickoff

- Meet with your CEO and/or senior manager to enlist their help in championing the campaign
- Attend the ECM orientation
- Recruit your campaign committee members
- Review strategy and results from last year's campaign with United Way staff

Four Weeks Before Kickoff

- Meet with your campaign committee to develop a plan and discuss campaign tactics and timing (*include an incentive program*)
- Segment employee lists to identify likely leadership donors
- Plan and schedule a leadership event
- Talk with human resources to establish a method to solicit retirees

Two Weeks Before Kickoff

- Recruit and confirm campaign representatives
- Determine agenda and training for campaign representatives
- Personalize pledge cards... consider including previous year's pledge. United Way staff can help!
- Check/order campaign supplies and promotional materials from United Way staff
- Arrange for speaker(s) with United Way staff
- Send solicitation letters to retirees. United Way staff can supply sample letters.

One Week Before Kickoff

- Launch campaign communications and promotional materials
- Train and solicit campaign representatives
- Send CEO communication to all employees (*letter or email samples supplied by United Way staff*)
- Launch leadership campaign event(s)

Week of Campaign Kickoff

- Hold an organization-wide kickoff event to build enthusiasm for the campaign
- Publicize results of the leadership campaign
- Conduct employee solicitation and encourage 100% participation
- Hold giveaways and drawings for those who have returned the pledge form
- Confirm that campaign representatives have talked to all employees
- Follow up with past contributors who have not yet responded
- Report progress to all employees regularly

Week of Campaign Close

- Determine final results and meet with CEO
- Announce total amount raised to employees
- Conduct final meeting with campaign committee and representatives
- Thank/recognize all contributors
- Submit final results to United Way