

WORKPLACE CAMPAIGN CHECKLISTS

<input checked="" type="checkbox"/> Before the Campaign	Target Date
<input type="checkbox"/> Attend United Way ambassador training.	
<input type="checkbox"/> Secure CEO/senior management support.	
<input type="checkbox"/> Determine your participation goal, monetary goal, and incentives.	
<input type="checkbox"/> Recruit a team to help with the campaign; assign tasks.	
<input type="checkbox"/> Meet with your loaned executive to discuss campaign strategies and develop a calendar of events.	
<input type="checkbox"/> Review the previous campaign's performance, opportunities, and challenges.	
<input type="checkbox"/> Determine your campaign plan and time frame.	
<input type="checkbox"/> Schedule your kickoff, United Way speaker, and any special events.	
<input type="checkbox"/> Promote the campaign and distribute your calendar of events.	
<input type="checkbox"/> Send a campaign kickoff letter from your CEO endorsing the campaign.	
<input type="checkbox"/> Invite retirees to your kickoff event.	

<input checked="" type="checkbox"/> During the Campaign	Target Date
<input type="checkbox"/> Hold kickoff event with loaned executive and agency speaker.	
<input type="checkbox"/> Ensure all employees have access to campaign materials and giving platforms.	
<input type="checkbox"/> Hold a leadership giving or loyal contributor (10+ year donors) event.	
<input type="checkbox"/> Keep the campaign alive by sharing success stories, community facts, and photos via your intranet.	
<input type="checkbox"/> Conduct special events, lunch and learn sessions, and other activities.	
<input type="checkbox"/> Monitor your progress towards your goal.	
<input type="checkbox"/> Remind individuals who have not pledged to consider making a gift.	
<input type="checkbox"/> Send reminders about campaign events, incentives, and deadlines.	

<input checked="" type="checkbox"/> After the Campaign	Target Date
<input type="checkbox"/> Ensure all pledges are received.	
<input type="checkbox"/> Follow up on any corporate contribution or employee match.	
<input type="checkbox"/> Calculate the results, review results with your committee members, and prepare final report for your United Way contact.	
<input type="checkbox"/> Announce results to all employees.	
<input type="checkbox"/> Post campaign photos on your corporate social media networks.	
<input type="checkbox"/> Evaluate the challenges and successes of your campaign. Keep the notes handy for next year.	
<input type="checkbox"/> Thank all donors with a celebration event, letter, or email from your CEO and a presentation from a United Way representative.	
<input type="checkbox"/> Talk to your loaned executive about how United Way can continue to improve its service.	

<input checked="" type="checkbox"/> Throughout the Year	Target Date
<input type="checkbox"/> Keep employees updated on United Way activities.	
<input type="checkbox"/> Promote volunteer opportunities.	
<input type="checkbox"/> Attend United Way events (Campaign Kickoff, Closing Celebration, P5 Awards, LINC activities, Women's Brunch, and more).	
<input type="checkbox"/> Share success stories.	
<input type="checkbox"/> Schedule an agency tour for your employees.	
<input type="checkbox"/> Host a drive.	
<input type="checkbox"/> Offer lunch and learn sessions.	

Resources for your campaign can be found at: UnitedWayGMWC.org/Campaign-Toolkit



Greater Milwaukee & Waukesha County



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