

Campaign Checklist



- Step 1: Get your CEO/senior management and co-workers involved
Involve
- CEO approves campaign plan and dates_____
 - Secure CEO endorsement letters and/or speaking engagement_____
 - Recruit a team
 - Team members and department _____
 - Recruit a Leadership Circle Giving coordinator
 - Leadership Coordinator name_____

- Step 2: Determine campaign theme and establish overall campaign activities and dates
Educate
- Theme_____
 - Establish a timeline of campaign activities
 - Meet with your United Way representative to help set and/or review campaign goals and plan
 - Secure campaign materials from UWMC
 - Materials requested_____
 - Train the committee to help run the campaign
 - Training Date(s)_____

- Step 3: Promote campaign and create buzz within your organization
Ask
- Campaign kick-off/rally_____
 - Conduct leadership giving meeting_____
 - Conduct group/department meetings_____
 - Final pledge due date_____

- Step 4: Collect and report
Report Back
- Close campaign and announce results
 - Use the Campaign Report on the following page to calculate campaign total and submit to UWMC

- Step 5: Say Thank you
Thank
- Method of thanks_____
 - Wrap-up Campaign Event_____

Debrief campaign with team members and your United Way representative. Brainstorm for ways to improve your campaign next year.