

CAMPAIGN CHECKLIST

PLAN YOUR CAMPAIGN

✓ TO DO	TARGET DATE
Attend United Way Workplace Campaign Leader (WCL) Kickoff Lunch.	
Review the previous campaign's performance to determine opportunities and challenges.	
Meet with your leadership to set participation and monetary goals and incentives for giving, and get his/her personal endorsement.	
Recruit a Co-Ambassador or Planning Committee (if needed).	
Meet with United Way to discuss campaign strategies and themes, and develop a calendar of events.	
Request materials, speakers, and agency tours (in-person or virtual) through your United Way liaison.	
Send a "Campaign Kickoff" invitation from your leadership endorsing and announcing the upcoming campaign. Invite retirees to your Kickoff event.	
Promote your campaign and distribute your calendar of events.	
Consider incorporating a volunteer opportunity into your campaign.	
Visit the online Campaign Toolkit any time for campaign materials and ideas.	

EXECUTE YOUR CAMPAIGN

Host a Kickoff Event with the United Way liaison and a speaker. • Make it easy with Sample Campaign Meeting Agenda (available in the online Toolkit). • Invite a United Way speaker or agency partner speaker. • Share your story. Why do you give?	
Acknowledge your Loyal Contributors (i.e.10+ year donors).	
Hold a Leadership Giving, Retiree, and/or Loyal Contributor event.	
Conduct special events, an agency tour or fair, and other activities. Share photos from your events on your company's social media and tag Tygart Valley United Way.	
Make sure every employee has the opportunity to give (receives a pledge form).	
Publicize community facts and interim campaign results on your company's social media.	

FINALIZE YOUR CAMPAIGN

Collect pledge forms, calculate results, and submit Campaign Report Form and copies of pledge forms to United Way. Submit originals to your payroll department.	
Review campaign results with your leadership, committee members, and United Way liaison.	
Announce results to all employees.	
Thank donors and plan recognition event or special celebration.	
CELEBRATE!	