

UNITED WAY CAMPAIGN CHECKLIST



Due Date:	Assigned To:	Tasks:
<p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>1. Plan</p> <p><u>Get Started</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Set up a meeting with your donor engagement representative. <input type="checkbox"/> Get ideas and materials at: unitedwaymidlands.org/campaign-headquarters <input type="checkbox"/> Create a timeline. <input type="checkbox"/> Develop a communications plan. <p><u>Build Your Committee</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Ask your donor engagement representative for tips and suggestions. <input type="checkbox"/> Find strong leaders in your organization to support your work. <input type="checkbox"/> Ask a Senior or Executive-level employee to get involved. <input type="checkbox"/> Recruit and train your committee members. <p><u>Have Fun With The Details</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Choose a theme. <input type="checkbox"/> Choose campaign materials to leverage. <i>United Way can deliver printed materials to your organization.</i> <input type="checkbox"/> Create fundraising activities. <input type="checkbox"/> Come up with incentives for employees. <input type="checkbox"/> Plan a kickoff and thank you event. <input type="checkbox"/> Set goals and share them in your communications.
<p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>2. Execute</p> <p><u>Build Momentum</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Utilize United Way materials to support your campaign. <input type="checkbox"/> Schedule campaign events and send out invites. <input type="checkbox"/> Host your virtual or in-person kickoff event. <input type="checkbox"/> Distribute pledge forms or online giving information. <p><u>Engage Leadership</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Have your CEO send a letter or e-mail encouraging participation. <input type="checkbox"/> Encourage your leadership team to participate in campaign events. <p><u>Get Your Team Excited</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Host fundraising activities and events. <input type="checkbox"/> Send daily or weekly communications updates. <input type="checkbox"/> Leverage employee incentives in communications. <input type="checkbox"/> Host a volunteer event to engage employees. <input type="checkbox"/> Host an agency speaker event.

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