

# United Way Campaign Timeline and Checklist



Six Weeks Before Kickoff	Target Date	Completed
<ul style="list-style-type: none"> <li>Attend Cabinet/ECC meeting or meet with United Way Campaign staff; review past performance and UW materials</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Meet with your CEO or Senior Manager to obtain their support for the campaign.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Start recruiting your campaign team. Educate your team members on United Way's role in the community.</li> </ul>		<input type="checkbox"/>

Four Weeks Before Kickoff	Target Date	Completed
<ul style="list-style-type: none"> <li>Set your company goal with your CEO and campaign team.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Develop a campaign plan (set campaign dates, theme, and incentives).</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Begin your leadership campaign. Ask UW staff for assistance identifying and soliciting leadership givers.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Assign tasks to your team—communications, event coordination, etc.</li> </ul>		<input type="checkbox"/>

Two Weeks Before Kickoff	Target Date	Completed
<ul style="list-style-type: none"> <li>Create energy, awareness, and passion! Begin publicizing your campaign (posters, flyers, employee newsletter.)</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Schedule agency tours and speakers. Ask UW campaign staff if you are interested!</li> </ul>		<input type="checkbox"/>

<b>One Week Before Kickoff</b>	<b>Target Date</b>	<b>Completed</b>
<ul style="list-style-type: none"> <li>Send CEO letter or e-mail endorsing campaign to all employees</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Create SPARKS! Talk about United Way, the benefits of giving, and your kick-off event to your co-workers</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Review all plans for event kick-off and pledging period with your campaign team</li> </ul>		<input type="checkbox"/>

<b>CAMPAIGN KICKOFF WEEK</b>	<b>Target Date</b>	<b>Completed</b>
<ul style="list-style-type: none"> <li>Host your company-wide campaign kickoff event!</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Collect pledge cards and hold drawings and giveaways for participating employees.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Be available to your campaign team and all employees to answer questions.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Keep the energy high!</li> </ul>		<input type="checkbox"/>

<b>The Week After Campaign Close</b>	<b>Target Date</b>	<b>Completed</b>
<ul style="list-style-type: none"> <li>Collect all remaining pledge cards and report results to United Way.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Post final campaign results to your employees.</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Thank all employees and campaign volunteers!</li> </ul>		<input type="checkbox"/>