



CAMPAIGN MANAGER CHECKLIST

Before the Campaign:

- ☐ Meet with your United Way representative.
- ☐ Secure CEO/Senior Management support.
- ☐ Review campaign history and set your goals.
- ☐ Recruit a campaign committee to help with the campaign.
- ☐ Determine your campaign plan, timeframe, and any incentives.
- ☐ Craft your campaign communications and gather any campaign materials.
- ☐ Schedule your kickoff, United Way speaker, and any special events.
- ☐ Promote the campaign with an announcement.

During the Campaign:

- ☐ Share giving links or pledge forms and campaign materials to every employee.
- ☐ Remember, online options are available if you're conducting a virtual campaign.
- ☐ Promote the campaign, kickoff, and special events through numerous channels.
- ☐ Hold a mid-campaign committee meeting to review the progress toward the goal.
- ☐ Send regular progress reports to employees and reminders about campaign events, incentives, and deadlines.
- ☐ Follow-up with individuals who have yet to pledge, keeping in mind current circumstances.

After the Campaign:

- ☐ Schedule a time with your United Way representative to close out your campaign.
- ☐ Take care of any corporate contributions or matches on employee giving.
- ☐ Send a thank you letter to everyone including the campaign committee and the CEO.
- ☐ Publish a short story, photo, and results of your campaign in your company newsletter and share through social media.
- ☐ Hold a post-campaign committee meeting to evaluate the challenges and successes of the campaign. Keep the notes handy for next year!
- ☐ Talk to your United Way representative so we can continue to improve our service.

Year Round:

- ☐ Keep employees updated on the activities of United Way, such as special events, donation drives, and volunteer opportunities.