

CAMPAIGN COORDINATOR CHECKLIST



PLAN (6 WEEKS BEFORE KICK-OFF)

- Attend the Campaign Coordinator Luncheon, hosted by your local United Way
 - Connect with your UW representative to review last year's campaign
 - Confirm your dates
 - Confirm type/quantity of materials required (info material, pledge forms, etc.)
- Secure CEO and Senior Leadership support, including written endorsement (letter/email)
- Recruit your campaign team
- Host a planning meeting with your campaign team to brainstorm ways to engage employees

GEAR UP (2 WEEKS BEFORE)

- Finalize your campaign calendar, including activities, contests, and giveaways
- Hang any posters/promotional materials
- Begin campaign promotion:
 - CEO letter/email to employees
 - Your letter/email to employees, including important dates

TAKE ACTION (DURING CAMPAIGN)

- Host your kick-off event
- Host a UW speaker (can be part of kick-off event)
- Ensure all employees get donation information (pledge forms) and incentives to participate
- Host activities, contests, etc.
- Send follow-up emails every few days to remind people of activities, track progress, and generate enthusiasm
- Send a "last call" email (final days of campaign)

WRAP UP (2 WEEKS FOLLOWING CAMPAIGN)

- Collect all pledge forms and ensure each form is signed
- Complete the following steps:
 1. Calculate results and complete "Campaign Report Envelope"
 2. Make copies of pledge forms and give them to your HR/payroll department
 3. Place original pledge forms in campaign envelope
 4. Give United Way your completed pledge envelope with original pledge forms inside
- Announce results to employees and host wrap-up event or thank them in another way
- Conduct a campaign debrief with your UW representative, including determining next year's Campaign Coordinator and tentative campaign dates