

# CAMPAIGN CHECKLIST



United Way  
of Coastal Carolina

## PLAN

- Meet with your United Way Representative and begin planning your campaign.
- Visit [www.unitedwaycoastalnc.org/campaign-toolkit](http://www.unitedwaycoastalnc.org/campaign-toolkit) for ideas and sample materials.
- Secure CEO or Senior Management support.
- Establish campaign goals like dollar amount and participation percentage.

## DUE DATE

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## GEAR UP

- Recruit and train your campaign team.
- Establish time line for campaign activities.
- Begin campaign promotion by sending a letter from management to employees. Samples are in the ECM Campaign toolkit.
- Prepare your campaign materials.

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## RUN

- Conduct a pacesetter campaign for leadership givers.
- Distribute pledge forms or email information about online giving to co-workers.
- Send follow-up emails every few days to maintain enthusiasm and momentum. Include updates, successes, and facts about United Way and the campaign
- Hold meetings and fundraising events.
- Provide co-workers opportunities to learn more by coordinating United Way speakers or volunteer activities.

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## CLOSE

- Send a reminder email that the campaign is concluding and pledge forms need to be submitted.
- Collect pledge forms and incentive tickets. Please be sure they are all signed and keep copies for your payroll/HR. Turn in weekly for entry in drawings
- Submit pledge forms and final reports/data to your payroll department.
- Announce campaign results to your co-workers.
- Thank co-workers with a celebration event, letter, email, etc.
- Thank campaign team, leadership contributors, and other special groups.
- Gather feedback and notes for next year.
- Choose an Employee Campaign Manager for next year and set next year's kickoff date then provide this information to your United Way Representative.

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## ONGOING

Host year-round volunteer events so employees can continue contributing to long-lasting change. Visit [www.unitedwaycoastalnc.org/get-involved](http://www.unitedwaycoastalnc.org/get-involved) and follow us on social media to learn about ways to be a year-round champion for our community. Stay current on news, our progress, and ways to stay involved by following United Way on Facebook, Twitter and Instagram.