

Adjust this timeline and checklist as needed for your campaign and use it to help you stay organized and on track for success.

5 to 6 WEEKS before Campaign Kickoff

- Meet with your United Way Relationship Manager to review last year's campaign
- Go to liveunitedcentralohio.org/workplace-campaigns for resources and ideas
- Meet with your CEO or senior management to confirm their support
- Recruit and train your campaign team

3 to 4 WEEKS Before

- Meet with your team
- Develop a campaign theme and special events
- Plan your timeline, strategies and goals
- Review and familiarize your team with campaign resources
- Schedule your Campaign Kickoff speakers
- Request materials, including pledge forms and brochures for all employees
- Personalize pledge forms with contact information and prior year giving information

1 to 2 WEEKS Before

- Promote your campaign kickoff and special events with posters and advance emails
- Send communications from CEO endorsing and announcing the campaign
- Prepare materials
- Plan kickoff event

KICKOFF and CAMPAIGN

- Launch campaign and distribute materials
- Make sure every employee has the opportunity to give
- Acknowledge management support
- Build excitement by sharing progress
- Send follow-up emails to build awareness
- Have fun!

AFTER Your Campaign

- Wrap up campaign, collect all pledge forms
- Calculate results and submit final reports to United Way
- Announce results
- Thank all employees with a celebration event, email or letter
- Thank your campaign team and leadership givers
- Conduct a campaign debrief with your team and gather notes for next year
- Pick next year's ECC and set a kickoff date