

# Campaign Checklist



United Way of Greater Houston



- Attend United Way Campaign Leaders Conference (July)
- Attend United Way Community Campaign Kickoff (September)
- Meet with United Way Representative (July – September)
- Enlist the support of your CEO and upper management (July)
- Recruit a Leadership Giving Chair to lead the leadership giving effort (July)
- Set Campaign dates (usually no more than 2 weeks)
- Recruit/Convene committee (8-10 weeks prior to campaign start date)
- Assign roles to committee members (8 weeks prior to start date)
- Set weekly committee meetings (at first meeting)
- Set your goal (overall, participation, leadership giving) (at first meeting if not before)
- Plan Leadership Giving Campaign to take place 1-2 weeks prior to overall campaign.**
  - Develop a detailed Leadership Giving strategic plan (With LG Chair and UW Representative) (6-8 weeks prior to LG campaign start date)
  - Schedule key events to include CEO, Campaign Chair and Leadership Giving Chair (6-8 weeks prior to LG campaign start date)
  - Identify potential Leadership Contributors in your company. Key prospects are employees earning \$50,000 or more annually.(4-6 weeks prior to LG campaign start date)
  - Recruit and train current Leadership Givers to assist as campaigners for Leadership prospects.(2 weeks prior to start date)
  - Kick off the Leadership Giving campaign prior to the overall campaign. Hold special meetings, tours and events
  - Begin peer visits and follow-up on results immediately following kickoff.
  - Thank all Leadership Givers following campaign.
  - Report the results of the Leadership giving campaign at the overall kick off to encourage others to give.
- Plan Kickoff – Make it fun! (8 weeks prior to campaign start date)**
  - Coordinate with UW Representative
  - Theme
  - Location
  - Food, prizes – ask your vendors and check out the United Way Company Store
  - Ask CEO/Campaign Chair to participate
  - Get the word out!
  - Report Leadership Giving campaign results
  - Show UW Campaign Video
  - Ask co-workers helped by United Way to share their stories

- Don't forget to distribute the UW Guide and pledge forms to each employee**
- Plan Employee Meetings – Cover all locations and shifts (6-8 weeks prior to start date)**
  - Invite UW Representative
  - Ask CEO/Campaign Chair to participate
  - Show UW Campaign Video
  - Distribute UW Guide and pledge cards (if haven't already)
- Coordinate Agency Tours – scheduled through UW Representative (2-4 weeks prior to campaign start date)**
- Recruit campaigners (4 weeks prior to campaign start date)**
- Plan Campaigner Training (4 weeks prior to campaign start date)**
  - Coordinate with United Way Representative
  - Set location – company conference room, agency facility
  - Plan an agency tour for your campaigners
- Don't forget to distribute materials to all employees!**
  - Pledge Cards (or email links to e-pledge application)
  - United Way Guide
  - Place United Way posters and other campaign advertising in break rooms and key meeting areas (1 week prior to campaign start date)
- Say Thank You (immediately following campaign end date)**
  - To Donors
  - Committee
  - Campaigners
- Collect all pledge cards and tally them up! (Immediately following campaign end date)**
- Remember to track leadership givers with contact information so we can recognize them properly in our Leadership Giving Roster (throughout campaign)**
- Complete the final Report Envelope for the United Way- make sure to include your signed Payroll Deduction Summary card and Corporate Gift card (Immediately following campaign end date)**
- Call your United Way Representative to collect your Report Envelope (Immediately following campaign wrap up)**
- Celebrate – you're finished! Thank you for all your hard work. You changed lives!**

