

# Campaign Checklist

	Person Responsible	Date to be Completed
<b>Four Weeks Prior to Solicitation</b>		
Meet with United Way staff and determine needed supplies and discuss possible awareness activities and solicitation methods		
Meet with your CEO		
Begin highlighting United Way in company newsletter/e-mail/website/bulletin boards		
Research previous campaign results and meet with previous coordinator(s)		
Recruit a committee and develop a campaign schedule		
Other:		
<b>Three Weeks Prior to Solicitation</b>		
Establish campaign goal and dates		
Schedule training sessions for committee members-providing information on "How United Way Works" and making the "Ask" for support		
Contact United Way to schedule speakers(s)		
Other:		
<b>Two Weeks Prior to Solicitation</b>		
Personalize pledge forms with labels		
Plan group solicitation meetings		
Hold agency fair; tour United Way agencies; offer other awareness activity		
Other:		
<b>One Week Prior to Solicitation</b>		
Send CEO endorsement letter supporting United Way (and organized labor letter supporting United Way, if applicable)		
Review all plans for campaign solicitation period		
Conduct solicitor training		
Other:		
<b>Active Solicitation (1-2 Weeks)</b>		
Have a Kick-off		
Group Meeting: have the room, speaker(s), pledge forms and pens ready		
Keep progress report monitoring campaign, including number of givers, contributors/pledges received and forms outstanding		
Keep the energy high		
Post progress of the campaign		
Other:		
<b>One Week After Active Solicitation</b>		
Follow up with employees who missed meetings, were on vacation, etc.		
Collect any unreturned pledge forms		
Report result to CEO, employees and United Way		
Say thank you to volunteers and donors		
Other:		
<b>Two Weeks After Active Solicitation</b>		
Conduct critique session with committee member and other key staff		
Produce a report for next year's employee coordinator		