

# CAMPAIGN LEADER CHECKLIST

## 2-3 Months Prior to Kick-Off

- Meet with your United Way representative.
  - Provide name, email address, and title of main contact person.
  - Discuss goals. Look at last year's campaign total and possibly increase.
  - Discuss the week(s) that the campaign will be active.
  - Discuss when United Way can speak to the group.
  - Discuss if pledges will be made on-line or manual forms or both.
  - Discuss what activities will make up the campaign.
  - Discuss how many posters and flyers will be needed.
- Seek CEO approval for campaign messaging and activities.
- Talk to your payroll dept about the best way to keep track of pledges for payroll deduction.
- Gather a team to plan activities, or team captains for multiple locations.
  - Plan regular meetings to brainstorm and plan fun activities (see examples).
- Connect with your United Way representative regularly for help or advice.

## 1 Week Before Kick-Off

- Ask CEO to send a letter to staff to announce United Way kick-off date. (see template)
- Hang posters and flyers.
- Email staff about fun activities.

## Campaign Kick-Off Day

- United Way representative speaks to staff.
- Start fun activities.

## Mid-Campaign

- Encourage team captains and staff to try to reach the goal.

## Campaign Wrap-Up

- Fill out campaign envelope. Always call your United Way representative for help at any time!
- Secure all checks and cash to the individual pledge forms with paper clips. Seal the envelope and call United Way for pickup.
- Send the payroll your list of employee payroll deduction pledges.
- Send an update to your team on their successful campaign!