

# WORKPLACE CAMPAIGN CHECKLISTS

	Target Date
<b>Before the Campaign</b>	
Request United Way coordinator training.	
Secure CEO/senior management support.	
Determine your participation goal, monetary goal, and incentives.	
Recruit a team (1 per 25 employees) to help with the campaign; assign tasks.	
Meet with your UW liaison to discuss campaign strategies and develop a calendar of events.	
Review the previous campaign's performance, opportunities, and challenges.	
Determine your campaign plan and time frame.	
Schedule your kickoff, United Way speaker, and any special events. (In-person or Virtual).	
Promote the campaign and distribute your calendar of events and promotional materials.	
Send a campaign kickoff letter from your CEO endorsing the campaign. Ask your UW liaison for a template. TIP: A brief video recording is also a great option to share!	
Invite retirees to your kickoff event.	

	Target Date
<b>During the Campaign</b>	
Hold kickoff event with UW liaison and agency speaker.	
Ensure all employees have access to campaign materials and giving platforms.	
Hold a leadership giving or loyal contributor (10+ year donors) event.	
Keep the campaign alive by sharing success stories, community facts, and photos via your intranet or social media.	
Conduct special events, lunch and learn sessions, and other activities.	
Monitor your progress towards your goal.	
Remind individuals who have not pledged to consider making a gift.	
Send reminders about campaign events, incentives, and deadlines.	

	Target Date
<b>After the Campaign</b>	
Ensure all pledge forms and immediate gifts are received, and paper forms are legible and complete.	
Follow up on any corporate contribution or employee match.	
Calculate the results, review results with your committee members, and prepare final report and complete envelope for your United Way contact.	
Announce results to all employees.	
Post campaign photos on your corporate social media networks.	
Evaluate the challenges and successes of your campaign. Keep the notes handy for next year.	
Thank all donors with a celebration event, letter, or email from your CEO and a presentation from a United Way representative.	
Talk to your UW liaison about how United Way can continue to improve its service.	

	Target Date
<b>Throughout the Year</b>	
Keep employees updated on United Way activities.	
Promote volunteer opportunities.	
Attend United Way events.	
Share success stories.	
Connect with your UW liaison to schedule an agency tour (may be in-person or virtual).	
Host a fundraising event to supplement your campaign & raise awareness	
Offer lunch and learn sessions.	

Resources for your campaign can be found at: [www.uwles.org/campaign-toolkit](http://www.uwles.org/campaign-toolkit) or contact your UW Liaison anytime!

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United Way of the Lower Eastern Shore