# Campaign Timeline and Checklist

## 6 Weeks Before Campaign
- **Target Date:**
- **Meet with United Way representative to develop campaign goals and strategies**
- **Obtain CEO endorsement and support**
- **Consider a segmented leadership campaign**
- **Review the previous campaign’s performance, determine opportunities and challenges.**
- **Recruit campaign team**
- **Train team/assign tasks**
- **Attend an Employee Campaign Coordinator training at United Way**
- **Develop campaign plan:**
  - Goal
  - Dates
  - Publicity/promotions
  - Incentives

## 4 Weeks Before Campaign
- **Target Date:**
- **Secure CEO’s approval of campaign plans**
- **Plan and schedule campaign kickoff**
- **Request a Speakers Bureau presentation by contacting your United Way representative or visiting:**
  - [www.uwolmsted.org/speakers-bureau-request](http://www.uwolmsted.org/speakers-bureau-request)
- **Personalize pledge forms with individual’s contact information (Use mailing labels!)**
- **Visit [www.uwolmsted.org/campaign-resources](http://www.uwolmsted.org/campaign-resources) for tools and ideas**
- **Do you have your campaign materials? ECCs will receive materials at individual meetings, trainings or campaign material pick-up day.**

## 2 Weeks Before Campaign
- **Target Date:**
- **Promote your campaign**
- **Market campaign kickoff**
- **Send communications from CEO endorsing/announcing campaign**
- **One week before:**
  - send reminder about campaign kickoff

## Kickoff Celebration
- **Target Date:**
- **Kickoff your campaign group meeting(s)**
- **Make sure every employee receives a pledge form and materials (i.e. brochures) and has the opportunity to give**
- **Share campaign giving results regularly with staff (and your United Way representative!)**
- **Send follow-up emails to keep up the enthusiasm and build awareness. Include community facts and success stories.**
- **Have fun!**

## After Your Campaign
- **Target Date:**
- **Wrap up campaign and collect all pledges. Follow up with those who did not turn in pledge forms.**
- **Tabulate the results and submit campaign envelope to United Way Deliver to UWOC office or have United Way representative pick up your campaign envelope. Please do not mail.**
- **Announce campaign results to your staff**
- **Thank all contributors with a celebration event, letter, email, gift, etc.**

## Throughout the Year
- **Attend United Way events:**
  - **Community Campaign Kickoff:**
    - August 1st - September 15th 2018
  - **Celebration of Caring and Giving:**
    - April 2019
  - **Participate in Days of Caring (September – November) or other volunteer engagement opportunities.**
  - **Offer new hires the chance to give through payroll contribution.**

---

## Contact United Way
Our campaign specialists are here to help along the way!
(507) 287-2000, rd@uwolmsted.org

---

**United Way of Olmsted County**
903 West Center Street, Suite 100, Rochester, MN 55902
Open Monday through Friday, 8:30 a.m. – 5 p.m.