

WORKPLACE CAMPAIGN TIMELINE CHECKLIST

Before the Campaign	Target Date
Attend United Way campaign training.	
Secure CEO/senior management support.	
Determine your participation goal, monetary goal, and incentives.	
Recruit a team to help with the campaign; assign tasks.	
Meet with your loaned executive 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.	
Promote the campaign and distribute your calendar of events.	
Send a campaign kickoff letter from your CEO endorsing the campaign.	

During the Campaign	Target Date
Hold kickoff event with United Way CEO & Campaign Chair.	
Ensure all employees have access to campaign materials and giving platforms.	
Participate in 80th Birthday Challenge.	
Keep the campaign alive by sharing success stories, community facts, and photos via your intranet.	
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.	
September 7th: T-Shirt Order forms due.	
October 7th: Community Wide Denim Day.	
October 12th: United Way Day at McDonald's.	
October 22nd: Day of Caring.	
October 31st: Submit 80th Birthday Challenge.	
November 18th: Sweepstakes Deadline.	

After the Campaign	Target Date
Ensure all pledges are received.	
Follow up on any corporate contribution or employee match.	
Calculate the results, review results with your committee members, and prepare final report 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.	

Throughout the Year	Target Date
Keep employees updated on United Way activities.	
Promote volunteer opportunities.	
Attend United Way events (Campaign Training, Thank You Celebration, Women United Events and much more!)	
Share success stories.	
Schedule an agency tour for your employees.	
Host a drive.	
Offer lunch and learn sessions.	
Offer group impact projects.	

Resources for your campaign can be found at: uwsac.org/tool-kit

