

Employee Campaign Coordinator's checklist

- | | DUE DATE |
|---|----------|
| <input type="radio"/> Meet with your United Way representative and begin planning your campaign. | __/__/__ |
| <input type="radio"/> Attend United Way's Employee Campaign Coordinator Training. | __/__/__ |
| <input type="radio"/> Go to unitedwayfrederick.org/campaign-toolbox for ideas and sample materials. | __/__/__ |
| <input type="radio"/> Secure CEO or senior management support. | __/__/__ |
| <input type="radio"/> Establish campaign goals like dollar amount and participation percentage. | __/__/__ |
| <input type="radio"/> Recruit and train your campaign team. | __/__/__ |
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| Gear Up | |
| <input type="radio"/> Establish a timeline for campaign activities. | __/__/__ |
| <input type="radio"/> Begin campaign promotion with posters and advance kickoff emails to staff. | __/__/__ |
| <input type="radio"/> Send letter from management to employees (sample available at unitedwayfrederick.org/campaign-toolbox) | __/__/__ |
| <input type="radio"/> Prepare your campaign materials. | __/__/__ |
| <input type="radio"/> If applicable, update your online pledge site and/or intranet – consider adding United Way program information. | __/__/__ |
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| Run | |
| <input type="radio"/> Conduct a pacesetter campaign for leadership givers. | __/__/__ |
| <input type="radio"/> Hand out pledge forms and/or email information about online giving to employees. | __/__/__ |
| <input type="radio"/> Send follow-up emails every few days to keep up enthusiasm. Include updates, facts and success stories. Find examples at unitedwayfrederick.org | __/__/__ |
| <input type="radio"/> Hold meetings and fundraising events (e.g. bake sale, raffle, soup contest). | __/__/__ |
| <input type="radio"/> See more ideas at unitedwayfrederick.org/campaign-toolbox . | __/__/__ |
| <input type="radio"/> Give employees the opportunity to learn more about United Way by coordinating speakers or volunteer activities. | __/__/__ |
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| Close | |
| <input type="radio"/> Send a reminder email that your campaign is concluding and pledge forms need to be submitted. | __/__/__ |
| <input type="radio"/> Collect pledge forms. | __/__/__ |
| <input type="radio"/> Submit contribution forms and final reports/data to your payroll department. | __/__/__ |
| <input type="radio"/> Announce campaign results to your employees. | __/__/__ |
| <input type="radio"/> Thank employees with a celebration event, letter, email, etc. | __/__/__ |
| <input type="radio"/> Thank your campaign team, leadership contributors and other special groups. | __/__/__ |
| <input type="radio"/> Gather feedback and notes for next year. | __/__/__ |
| <input type="radio"/> Choose an Employee Campaign Coordinator, set next year's kickoff date, and provide this information to your United Way representative. | __/__/__ |

Ongoing

Stay connected to United Way throughout the year! Find us at [Facebook.com/liveunitedfrederick](https://www.facebook.com/liveunitedfrederick), on Twitter at @UnitedWayFred and on Instagram @UnitedWayFrederick to stay up-to-date on our community impact, volunteer opportunities and networking events. Sign up for our quarterly newsletter and learn more about our work at unitedwayfrederick.org.