Employee Campaign Coordinator's checklist

Plan

- O Meet with your United Way representative and begin planning your campaign.
- O Attend United Way's Employee Campaign Coordinator Training.
- Go to <u>unitedwayfrederick.org/campaign-toolbox</u> for ideas and sample materials.
- Secure CEO or senior management support.
- Establish campaign goals like dollar amount and participation percentage.
- Recruit and train your campaign team.

Gear Up

- Establish a timeline for campaign activities.
- ◯ Begin campaign promotion with posters and advance kickoff emails to staff.
- \bigcirc Send letter from management to employees (sample available at
- unitedwayfrederick.org/campaign-toolbox)
- Prepare your campaign materials.
- If applicable, update your online pledge site and/or intranet consider adding United Way program information.

Run

- \bigcirc Conduct a pacesetter campaign for leadership givers.
- \bigcirc Hand out pledge forms and/or email information about online giving to employees.
- Send follow-up emails every few days to keep up enthusiasm. Include updates,
- facts and success stories. Find examples at unitedwayfrederick.org
- \bigcirc Hold meetings and fundraising events (e.g. bake sale, raffle, soup contest).
- O See more ideas at <u>unitedwayfrederick.org/campaign-toolbox</u>.
- Give employees the opportunity to learn more about United Way by coordinating speakers or volunteer activities.

Close

- Send a reminder email that your campaign is concluding and pledge forms need to be submitted.
- Collect pledge forms.
- Submit contribution forms and final reports/data to your payroll department.
- Announce campaign results to your employees.
- \bigcirc Thank employees with a celebration event, letter, email, etc.
- Thank your campaign team, leadership contributors and other special groups.
- ◯ Gather feedback and notes for next year.
- Choose an Employee Campaign Coordinator, set next year's kickoff date, and provide this information to your United Way representative.

Ongoing

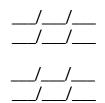
Stay connected to United Way throughout the year! Find us at <u>Facebook.com/liveunitedfrederick</u>, on Twitter at @UnitedWayFred and on Instagram @UnitedWayFrederick to stay up-to-date on our community impact, volunteer opportunities and networking events. Sign up for our quarterly newsletter and learn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

DUE DATE









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