

## CAMPAIGN TIMELINE AND CHECKLIST

### 6 Weeks Before

- Attend ECM Training, hosted by United Way (July 18<sup>th</sup> or September 20<sup>th</sup> 8:00AM-9:30AM)
- Review the previous campaign's performance, determine opportunities and challenges
- Meet with your CEO to confirm his or her commitment
- Recruit and train a campaign team to help you run the campaign and plan fundraising events
- Meet with your Account Executive to develop campaign goals and strategies
- Develop campaign timeline with dates and goals
- Visit United Way's online campaign toolkit for materials and ideas

### 4 Weeks Before

- Plan your campaign theme and special events
- Set dates for employee meetings and agency tours
- Ask your Account Executive about speakers for employee meetings
- Request materials, including pledge forms and brochures for all employees
- Personalize pledge forms with contact information and prior year giving information for each employee

### 2 Weeks Before

- Promote your campaign special events and meetings
- Conduct a leadership giving campaign, one of the best ways to increase the success of your overall campaign
- Send communications from the CEO endorsing and announcing the campaign

### Kickoff Celebration

- Launch your campaign group meetings
- Make sure every employee receives materials and has an opportunity to give
- Conduct special events and activities
- Publicize interim campaign results
- Send follow-up emails every few days to keep up enthusiasm and build awareness; include community facts and success stories
- Have fun!

### After Your Campaign

- Wrap up campaign, collect all pledges and follow up with those who did not turn in pledge forms
- Calculate results and submit final reports to United Way
- Announce results to your staff
- Thank all contributors with a celebration event, letter, email or visit from a United Way representative
- Conduct a campaign debrief with your team and Account Executive, and develop a written summary for next year

*Find campaign resources at:*

<http://www.unitedwaynsv.org/campaign-tools>



United Way of Northern  
Shenandoah Valley