

CAMPAIGN CHECKLIST

PLAN YOUR CAMPAIGN

✓ TO DO	TARGET DATE
Attend United Way Ambassador Roundtable Training.	
Review the previous campaign's performance to determine opportunities and challenges.	
Meet with your leadership to set participation and monetary goals and incentives for giving, and get his/her personal endorsement.	
Recruit a Co-Ambassador or Planning Committee (if needed).	
Meet with your United Way liaison to discuss campaign strategies and themes, and develop a calendar of events.	
Request materials, speakers, and agency tours (in-person or virtual) through your United Way liaison.	
Send a "Campaign Kickoff" invitation from your leadership endorsing and announcing the upcoming campaign. Invite retirees to your Kickoff event.	
Promote your campaign and distribute your calendar of events.	
Consider incorporating a volunteer opportunity into your campaign.	
Visit the online Campaign Toolkit any time for campaign materials and ideas.	

EXECUTE YOUR CAMPAIGN

Host a Kickoff Event with the United Way liaison and a speaker. <ul style="list-style-type: none"> • Make it easy with Sample Campaign Meeting Agenda (available in the online Toolkit). • Show at least one of the United Way Videos. • Share your story. Why do you give? 	
Acknowledge your Loyal Contributors (i.e. 10+ year donors).	
Hold a Leadership Giving, Retiree, and/or Loyal Contributor event.	
Conduct special events, an agency tour or fair, and other activities. Share photos from your events on your company's social media and tag United Way of Denton County.	
Make sure every employee has the opportunity to give (receives a pledge form or can log into ePledge).	
Publicize community facts and interim campaign results on your company's social media.	

FINALIZE YOUR CAMPAIGN

Collect pledge forms, calculate results, and submit Campaign Report Form and white copies of pledge forms to your United Way liaison. Submit yellow copies to your payroll department. Donors keep pink copies.	
Review campaign results with your leadership, committee members, and United Way liaison.	
Announce results to all employees.	