

# Workplace Campaign Checklist

Plan Your Campaign	Target Date	Complete
Attend United Way Campaign Coordinator Training		<input type="checkbox"/>
Review the previous campaign's performance, determine opportunities and challenges		<input type="checkbox"/>
Meet with your CEO, determine your participation and monetary goals, incentives for giving and get his/her personal endorsement.		<input type="checkbox"/>
Recruit a Campaign Team (if necessary)		<input type="checkbox"/>
Train team/Assign tasks		<input type="checkbox"/>
Develop a Leadership Giving Campaign (utilize Chisholm Trail program for levels)		<input type="checkbox"/>
Plan Your Organization's Campaign Kickoff		<input type="checkbox"/>
Schedule/Announce Campaign Kickoff		<input type="checkbox"/>
Arrange for Agency Speaker with Cooke County United Way staff		<input type="checkbox"/>
Send reminder about Campaign Kickoff		<input type="checkbox"/>
Ensure you have all Campaign Supplies		<input type="checkbox"/>

Execute Your Campaign	Target Date	Complete
Hold Kickoff Event with a United Way speaker and video		<input type="checkbox"/>
Make sure every employee receives a pledge card and has the opportunity to give		<input type="checkbox"/>
Establish deadline for pledge cards/ePledge		<input type="checkbox"/>
Conduct special events, fundraisers and other activities		<input type="checkbox"/>
Share photos of employees participating in events through internal channels and social media. Make sure to tag Cooke County United Way!		<input type="checkbox"/>
Report campaign progress to employees and United Way		<input type="checkbox"/>

Finalize Your Campaign	Target Date	Complete
Collect pledges, calculate results and submit campaign envelopes to United Way staff. Follow up with any regular donors who did not pledge		<input type="checkbox"/>
Announce final results to employees		<input type="checkbox"/>
Thank all donors with a celebration event, letter or email from your CEO, or a visit from a United Way representative.		<input type="checkbox"/>

Live United All Year	Target Date	Complete
Attend The BIG Day of Caring (April)		<input type="checkbox"/>
Attend The Celebration Luncheon (December)		<input type="checkbox"/>
Attend other Cooke County United Way Events		<input type="checkbox"/>
Offer New Hires a chance to give		<input type="checkbox"/>
Offer Retirees a chance to continue giving		<input type="checkbox"/>

**WE'RE HERE TO HELP!**

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