

CAMPAIGN CHECKLIST

DUE DATE

PLAN

- ◇ Meet with your Trident United Way representative and begin planning your campaign ___/___/___
- ◇ Attend the Employee Campaign Coordinator best practices training ___/___/___
- ◇ Go to www.tuw.org for ideas and sample materials ___/___/___
- ◇ Establish campaign goals such as dollar amount and participation percentage ___/___/___

GEAR UP

- ◇ Recruit and train your campaign team; establish a timeline ___/___/___
- ◇ Begin campaign promotion ___/___/___
- ◇ Secure a corporate gift or corporate match commitment ___/___/___
- ◇ Send a message from management to employees ___/___/___
- ◇ Order campaign supplies and prepare campaign materials ___/___/___
- ◇ Prepare a spreadsheet template for your ePledge campaign (optional) ___/___/___

RUN

- ◇ Conduct a leadership meeting to kick off the campaign ___/___/___
- ◇ Hand out pledge forms and/or email information about online giving to employees ___/___/___
- ◇ Send follow-up emails and offer incentives to keep enthusiasm high ___/___/___
- ◇ Hold meetings and education sessions about Trident United Way's work, consider giveaway for your team ___/___/___

CLOSE

- ◇ Send a reminder email that the campaign is concluding, and pledge forms are needed ___/___/___
- ◇ Collect pledge forms, make copies as needed, and hand in originals to Trident United Way ___/___/___
- ◇ Complete envelope with pledge forms; contact relationship manager to submit to Trident United Way ___/___/___
- ◇ Submit contribution forms and final reports/data to your payroll department ___/___/___
- ◇ Announce results to your employees and thank them with a celebration event, letter, email, etc. ___/___/___
- ◇ Thank your campaign team, leadership contributors and other special groups ___/___/___
- ◇ Change/flip the Trident United Way campaign posters to display thank you message ___/___/___
- ◇ Gather feedback and notes for next year ___/___/___

YEAR-ROUND ENGAGEMENT

- ◇ Provide regular updates on Trident United Way's work and sign up on tuw.org for newsletter in your inbox ___/___/___
- ◇ Include Trident United Way's feature success stories in your company newsletter ___/___/___
- ◇ Host a team meeting offsite: include an agency tour, poverty simulation or guest speaker ___/___/___
- ◇ Contact Trident United Way for help finding volunteer opportunities that are the right match for your employees ___/___/___
- ◇ Send quarterly volunteer engagement calendar to employees ___/___/___
- ◇ Invite your Trident United Way Relationship Manager to speak at additional meetings year-round ___/___/___

CONNECT WITH US



www.tuw.org



@TridentUnitedWay



@TridentUWay



Trident United Way



Your Trident United Way Relationship Manager is available to you year-round to help make your campaign success!

My Relationship Manager Is: _____

Contact Information: _____
