Campaign Planning Checklist

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| **TARGET COMPLETION DATE:** | **TASK** | **COMPLETED** |
|  | **Meet with your United Way CKL Contact:*** Review last year’s campaign, strategize for this year’s campaign, and learn about new campaign tools and materials.
* Update employee lists and any new retirees, or soon-to-retire individuals.
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|  | **Plan your campaign:*** Identify strengths and opportunities for growth from your previous campaign.
* Set participation and financial goals for your campaign.
* Work with your Campaign Team to develop a detailed timeline and calendar of events using this guide.
* To obtain logos, graphics and other useful materials, visit: [www.ckl.unitedway.ca](http://www.ckl.unitedway.ca)
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|  | **Recruit your Campaign Team:** * Your team should include members from all departments, levels and locations of your organization.
* Even if you are a small workplace, having a team will be a big help.
* Recruit Campaign Canvassers for peer-to-peer solicitations, which is the most effective method of fundraising. Strive to recruit one representative for every 10-20 employees.
* Include your United Way contact who can offer ideas, provide support, request community speakers, and make presentations.
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|  | **Train your Team! Educate your team members on United Way’s role in the community.*** Hold a Campaign Canvassers training session at your workplace; your United Way contact can help.
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| **TARGET COMPLETION DATE:** | **TASK** | **COMPLETED** |
|  | **Launch your campaign:*** Announce your goal(s) for the campaign, activities and incentives.
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|  | **Make the Ask:*** Strive to ask 100% of your organization’s employees and retires to donate to United Way CKL.
* Do a one-on-one, peer-to-peer ask with personal follow-up.
* Collect donor information so that United Way can personally thank them for their gift and report back on their impact.
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|  | **Report Results:** * Schedule a mid-campaign update meeting with your committee and your United Way contact. At the mid-point of your campaign, dollars should be close to 70% of your campaign goal. This meeting is an opportunity for problem solving, motivating your team, and thanking them.
* Deliver all forms for payroll deduction gifts to your payroll department(s). Keep your employees informed on campaign progress.
* Follow up. Ensure all donors have been given the opportunity to give by doing personal check-in reminders.
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|  | **Say Thank You!*** Thank all donors and volunteers who have made your campaign a success.
* Hold a thank you event for employees.
* Invite United Way to report back to staff on the impact of their gifts. A presentation or Day of Caring in the months following your campaign reinforces the value of donors’ gifts.
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