

Campaign Planning Checklist

TARGET COMPLETION DATE:	TASK	COMPLETED
	Meet with your United Way HKL Contact: <ul style="list-style-type: none"> 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. 	
	Plan your campaign: <ul style="list-style-type: none"> 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.hkl.unitedway.ca 	
	Recruit your Campaign Team: <ul style="list-style-type: none"> 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. 	
	Train your Team! Educate your team members on United Way's role in the community. <ul style="list-style-type: none"> Hold a Campaign Canvassers training session at your workplace; your United Way contact can help. 	

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	Launch your campaign: <ul style="list-style-type: none"> Announce your goal(s) for the campaign, activities and incentives. 	
	Make the Ask: <ul style="list-style-type: none"> Strive to ask 100% of your organization's employees and retirees to donate to United Way HKL. 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. 	
	Report Results: <ul style="list-style-type: none"> 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. 	
	Say Thank You! <ul style="list-style-type: none"> 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. 	