

Checklist for Workplace Campaigns

Workplace: _____

Campaign Coordinator: _____ Phone: _____

This is a basic checklist to make your workplace campaign a breeze! Please don't hesitate to reach out to UWLCA staff at (406) 442-4360 or email dana@unitedwaylca.org with any questions. If you need additional materials or tips to make your campaign a success, please visit us online at www.unitedwaylca.org and visit the page for "**Workplace Campaign Tools**" to download files designed for your use today!

___ Set a firm start and end date for my workplace campaign.

___ Invite UWLCA staff to present about their work or present myself based on workplace talking points provided by UWLCA (call 442-4360).

___ Talk to department heads and President/CEO to get their buy-in. Ask the CEO to send the initial email letting the team know when the campaign will start and stating their support.

___ Distribute initial campaign materials (email template, brochures, posters, etc.).

___ Follow up with colleagues to collect pledge cards and hand out donor acknowledgements.

___ Update workplace campaign progress by filling in the thermometer on our campaign poster.

___ Send out second call for donations and pledges (email template, brochures, etc.).

___ Follow up with colleagues to collect pledge cards and hand out donor acknowledgements.

___ Send out final call for donations and pledges (email template, brochures, etc.).

___ Follow up with colleagues to collect pledge cards and hand out donor acknowledgements.

___ Check to see if a corporate match will be made for employee gifts. (Historical corporate matches can be found on the Campaign History Report provided in your large campaign envelope by UWLCA.)

___ Tally all pledges and donations and fill out the front of your large campaign envelope.

___ Make copies of each of the pledge cards your colleagues filled out and submit them to your payroll representative to process, with the donation cycle for this campaign year starting on January 1, 2019.

___ Complete this checklist (including the feedback section below) and insert into large campaign envelope with all pledge cards, donations, and other materials, seal the envelope, and schedule a pick-up or drop-off with United Way staff by calling (406) 442-4360.



