

CAMPAIGN PLANNING

TIMELINE & CHECKLIST



United Way
of the Blue Mountains

- Use this timeline and mark your calendar to get organized for your upcoming United Way of the Blue Mountains campaign!

BEFORE KICK-OFF

6-8 weeks out:

- Schedule a meeting with your United Way contact to discuss the campaign.
- Make plans for your kick-off. If you are holding a more elaborate kick-off with events, prizes, refreshments, etc., it's a good idea to start planning early.

4-6 weeks out:

- Visit the campaign resources page at www.uwbluemt.org/content/workplace-giving for resources to help you generate support for your campaign.
- Download the materials you need. If you need to order any materials through United Way, let them know.
- Reach out to co-workers and recruit ambassadors to help you run your campaign.
- Schedule your kick-off, department meetings, a leadership event and any other engagement/educational events during your campaign. Think about the speakers you would like from United Way and/or the community. Work with your Campaign contact to make plans and secure speakers.

2-3 weeks out:

- Browse creative fundraising ideas at www.uwbluemt.org. If you decide to hold any events, your Campaign contact will work with you to start making plans as soon as possible.
- Make sure your co-workers have received invites to your events.

One week out:

- Finalize plans for your kick-off.
- Print any campaign materials you need at www.uwbluemt.org/content/workplace-giving

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4-5 days out:

- Customize and send intro email to get your co-workers geared up for campaign.
- Hang campaign posters.

DAY OF KICK-OFF

- Send kick-off email.
- If running a paper campaign, hand out pledge forms to co-workers.
- Hand out information about United Way's work to co-workers.

THROUGHOUT CAMPAIGN

- Send mid-campaign email with success stories.
- Send fast facts emails.
- One day before campaign ends: Send one-day reminder email.

AFTER CAMPAIGN

- 1-2 days after campaign closes - Send thank you email.
- Up to 2 weeks after campaign closes - Mail checks to United Way.
- Send campaign reports to United Way.