

CAMPAIGN PLANNING TIMELINE & CHECKLIST



United Way
of Central Maryland
uwcm.org

- Use this timeline and mark your calendar to get organized for your upcoming United Way of Central Maryland campaign!

Don't forget, your United Way Relationship Manager (RM) is always there to help you plan and execute your campaign.

BEFORE KICK-OFF

6-8 weeks out:

- Schedule a meeting with your RM 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.
- If your workplace runs an electronic/online campaign, contact your human resources or payroll department to obtain an Excel file of employees so United Way can start building your workplace's giving website.

4-6 weeks out:

- Visit the campaign resources page at www.uwcm.org/resources 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 your RM know.
- Reach out to co-workers and recruit ambassadors to help you run your campaign.
- Schedule a training where your RM can educate ambassadors and generate excitement about 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 RM to make plans and secure speakers.

2-3 weeks out:

- Browse creative fundraising ideas at www.uwcm.org/resources. If you decide to hold any events, your RM 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.uwcm.org/resources.

CAMPAIGN PLANNING TIMELINE & CHECKLIST

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 donor guides and other 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 your RM.