



PHASE ONE (at least six weeks before kickoff)	✓	NOTES FOR FOLLOW UP
Meet with United Way Representative		
Obtain CEO endorsement and support		
Recruit campaign team		
Develop campaign plan:		
Campaign fundraising goal		
Employee participation goal		
Timetable		
Publicity/Promotions		
Incentives		
PHASE TWO (at least four weeks before kickoff)	✓	NOTES FOR FOLLOW UP
Develop a leadership giving campaign		
Secure management's approval of plan		
Plan and market the campaign kickoff		
Schedule/ announce campaign kickoff		
Arrange member nonprofit speakers and tours		
Arrange United Way speakers/presentation		
Send letter from top executives to all employees		
PHASE THREE (in the final week before kickoff)	✓	NOTES FOR FOLLOW UP
Send reminder about kickoff meetings		
Arrange for announcements at company meetings		
Re-check food and beverage orders for expected turnout		
KICKOFF		
PHASE FOUR (one week after kickoff)	✓	NOTES FOR FOLLOW UP
Send reminders to employees		
Host United Way for Presentation		
PHASE FIVE (three weeks after kickoff)	✓	NOTES FOR FOLLOW UP
Host a thank you event		
Submit final results to United Way representative		
PHASE SIX (anytime throughout the year)	✓	NOTES FOR FOLLOW UP
Attend United Way campaign events		
Participate in Day of Caring volunteer opportunities		
Offer new hires the chance to give through payroll		