

ON-SITE AMBASSADOR CHECKLIST

BEFORE CAMPAIGN

- ☐ Meet with Leadership & Identify Campaign Date
- ☐ Recruit additional Ambassadors
- ☐ How will staff attend?
- ☐ Large or small meetings?
- ☐ Prep Pledge Forms
- ☐ Secure employee incentives
- ☐ Review Digital Toolkit
- ☐ Send out invitations

1 WEEK OUT

- ☐ Send out reminder to staff
- ☐ Confirm leadership will attend and speak
- ☐ Confirm speakers & marketing materials
- ☐ Send out reminder email about campaign kick-off
- ☐ Update Project Manager with number of RSVP's

DAY OF KICK OFF

- ☐ Resend Invitation
- ☐ Ensure Powerpoint is up and running
- ☐ Track all check / cash gifts
- ☐ Reminder –One time giving also available through online link
- ☐ Hand out marketing material
- ☐ Hand out pledge forms
- ☐ Campaign will run for 2 weeks
- ☐ Ready. Set. INSPIRE!

CAMPAIGN CLOSE & FOLLOW UP

- ☐ Ensure everyone had a chance to give
- ☐ Discuss campaign matching
- ☐ Volunteer Opportunities
- ☐ Review campaign numbers & submit campaign envelope
- ☐ Send out Thank you email

For more information about United Way of San Joaquin County call 209.469.6980 or visit unitedwaysjc.org

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VIRTUAL AMBASSADOR CHECKLIST

BEFORE CAMPAIGN

- ☐ Meet with Leadership & Identify Campaign Date
- ☐ Recruit additional Ambassadors
- ☐ How will staff attend online?
- ☐ Large or small meetings?
- ☐ Prep Pledge Forms
- ☐ Secure employee incentives
- ☐ Review Digital Toolkit
- ☐ Send out invitations

1 WEEK OUT

- ☐ Send out reminder to staff
- ☐ Confirm leadership will attend and speak
- ☐ Ensure online pledge form is up and running
- ☐ Send out reminder email about campaign kick-off
- ☐ Update Project Manager with number of RSVP's

DAY OF KICK OFF

- ☐ Resend Invitation
- ☐ Make sure online link is working
- ☐ Track all check / cash gifts
- ☐ Reminder –One time giving also available through online link
- ☐ Send out complete digital toolkit to staff
- ☐ Campaign will run for 2 weeks
- ☐ Ready. Set. INSPIRE!

CAMPAIGN CLOSE & FOLLOW UP

- ☐ Ensure everyone had a chance to give
- ☐ Discuss campaign matching
- ☐ Volunteer Opportunities
- ☐ Review campaign numbers & submit campaign envelope
- ☐ Send out Thank you email

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