

Campaign Coordinator Checklist

BEFORE THE CAMPAIGN

- _____ Meet with your United Way Account Manager to review prior year's giving and develop a campaign strategy.
- _____ Meet with your CEO and Union Leader, (if applicable), to confirm commitment to the campaign.
- _____ Determine your Campaign Team.
- _____ Establish your employee goals (total amount, participation percentage, per capita giving).
- _____ Determine the type of campaign best suited for your company (one-on-one approach, group meeting/meetings, or a combination).
- _____ Establish a campaign timetable.
- _____ Publicize your campaign to the employees.
- _____ Personalize the campaign.
- _____ Tour United Way of the Wabash Valley member agency.

DURING THE CAMPAIGN

- _____ Kick off your campaign.
- _____ Conduct senior management-giving campaign with CEO (Vanguard program).
- _____ Schedule employee rallies.
- _____ Have a United Way agency speaker.
- _____ Follow up with absentees.
- _____ Conduct a clothing, toy, book or food drive.
- _____ Issue weekly progress reports to the UWWV office and your employees.
- _____ Have a campaign celebration for accomplishing your goal!

AFTER THE CAMPAIGN

- _____ Tabulate results and complete your Campaign Report Envelope.
- _____ Call your United Way Account Manager to arrange the pick-up of your report.
- _____ Thank your Campaign Team.
- _____ Draft a letter from your CEO and Union Leader, (if applicable), to thank the employees for their contributions.
- _____ Do a post-campaign evaluation.
- _____ Pat yourself on the back for a JOB WELL DONE!

Simple Steps to a Successful Campaign



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what matters.™ people...results...community.

Simple Steps to a Successful United Way Campaign

1. CREATE A WINNING TEAM

- Recruit a campaign committee with representatives from all levels/shifts and departments.
- Schedule in-house training sessions for your committee through your United Way Account Manager.

2. GET TOP LEVEL SUPPORT

- Ask your CEO/President to endorse and promote the campaign objectives and goals.
- A letter from the top endorsing the campaign to all employees means a lot!
- Providing company time for campaign planning, meetings and special events helps to create a community-minded culture.



5. RUN THE CAMPAIGN!

- Publicize your campaign well in advance through posters, flyers, newsletters or e-mails.
- Participate in the United Way Days of Caring.
- Keep your campaign fun to draw people in. Pick a theme!
- Have a campaign kick-off special event.
- Invite a United Way agency speaker to your employee meetings.
- Have a goal thermometer in a visible place so everyone knows how close you are to your goal.
- Conduct your collection drives.

6. REPORT THE RESULTS

- As soon as the campaign is complete, fill out your Campaign Report Envelope, Corporate Pledge Card and Summary of Employee Pledge Card.
- Call your United Way Account Manager to pick up your report.

A Sample Campaign Presentation

1 minute	Welcome by the Campaign Coordinator
2 minutes	Campaign endorsement by the CEO
2 minutes	Campaign endorsement by Labor or comments by employee touched by United Way
5 minutes	United Way representative presentation and Q & A
4 minutes	United Way campaign video
5 minutes	Agency speaker
3 minutes	Make the ask and review the pledge form
2 minutes	Collect the pledge forms and say thank you!



3. ANALYZE PAST CAMPAIGN PLANS & RESULTS

- Meet with last year's Employee Campaign Coordinator.
- Evaluate past campaigns and your company's United Way history.
- Utilize your United Way Account Manager for information.
- What is the current number of employees?
- What was the total number of employees who contributed last year?
- What were the best parts of last year's campaigns?
- What parts of the last year's campaign need improvement?

4. DETERMINE A WINNING PLAN & SET YOUR GOALS

- What are your goals?
 - A dollar figure?
 - A participation percentage?
 - A per capita gift amount?
- Goals should be meaningful and obtainable.
- Determine specific campaign start and end dates.
- Choose a campaign method such as group meetings, divisional meetings, the one-on-one approach or a combination of methods.
- Make your campaign informative as to what United Way does.
- Are there any employees who have had an experience with a United Way program? If so, have them speak to the other employees.
- Schedule special events such as raffles, silent auctions, luncheons and office Olympics.
- Consider conducting collection drives for books, clothing, food or toys to benefit United Way agencies and programs.
- Inform your United Way Account Manager of your needs for a campaign video or DVD, posters, NFL schedule cards, lapel pins and goal thermometers.

7. CELEBRATE YOUR SUCCESS & SAY THANK YOU

- Have a special event to celebrate your company's commitment to the community.
- Send thank you notes or letters to the employees who contributed.
- Post company-wide thank you messages in highly visible places.
- Have the CEO/President recognize members of your campaign team for all their efforts.
- Pat yourself on the back for a JOB WELL DONE!

