

YOUR CAMPAIGN CHECKLIST

PRIOR TO THE CAMPAIGN

- Meet with a United Way representative and review last year's campaign. Call 304.523.8929 or email liveunited@unitedwayrivercities.org.
- Set up a meeting with your company/organization leadership to enlist his/her support.
- Recruit a strong and diverse campaign team.
- Plan a **"Be1Get1"** campaign. (Be a donor. Get a donor.)
- Develop strategies, a timeline and goals (15% increase in # of donors for this year's campaign). Schedule a meeting with your United Way representative to discuss the campaign and set a first-time goal.
- Reserve room(s) for group meetings and/or special events.
- Contact United Way to arrange for a speaker at group meetings.
- Ask a member of senior management to serve as a Leadership Giving Chair.
- Personalize pledge forms. (Print or place labels with each employee's name.)
- Consider incentives for various levels of giving. Use **United Way's 2011 Giving Incentive** (sponsored by Dutch Miller Automotive) color flyers available for each employee. Contact the United Way office for copies.
- Distribute emails leading up to the campaign to educate, build enthusiasm and inform people of key dates. Post information on your company's intranet if you are unable to send these as emails.
- Send out an endorsement letter email from company leadership.
- Other _____

DURING THE CAMPAIGN

- Distribute personalized pledge forms as people enter the group meeting(s).
- Run a separate leadership giving solicitation for those who have the potential to give \$500 or more annually if appropriate.
- Promote the campaign in company newsletters, intranet and via email.
- Hang posters and update thermometers regularly.
- Make your own contribution to the campaign.
- Follow up with anyone who has not yet turned in their pledge form.
- Other _____

AFTER THE CAMPAIGN

- Complete the contribution report envelope summarizing your results and return to United Way.
- Host an event to wrap up the campaign, announce results and recognize those who volunteered and contributed.
- Send out thank you notes and/or letters signed by leadership.
- Promote the results of your campaign in company newsletters, intranet and via email. People like to find out how they did!
- Display United Way thank-you posters.
- Evaluate your results with recommendations for next year.
- Consider implementing a new hires program.
- Post information about United Way and "How I LIVE UNITED™" stories year-round.
- Give all employees a copy of their pledge form for tax purposes.
- Give copies of all pledge forms, cash, check, etc., to your United Way representative.
- Other _____

**JOIN HANDS. OPEN YOUR HEART.
LEND YOUR MUSCLE. FIND YOUR VOICE.
THIS IS YOUR GUIDE TO LIVING UNITED
AS A CAMPAIGN COORDINATOR.**



**GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED™**

Your United Way representative:

Name: _____

Email: _____

Telephone: _____

Visit www.unitedwayrivercities.org for more ideas!

United Way
of the River Cities



KEYS TO RUNNING A SUCCESSFUL UNITED WAY CAMPAIGN

1. **Enlist** the support of your company leadership.
2. **Recruit** a campaign team to assist you.
3. **Meet one-on-one** with a United Way representative and/or staff.
4. **Develop strategies** and set a **goal (suggestion: 15% increase in donor base over last year)**. Use the United Way theme of **“Be1Get1”** to help increase your donor base and reach your goal. Schedule a meeting with your United Way representative to discuss the campaign and set a first-time goal.
5. **Host employee group meetings** (see agenda at right). Use the meetings and other communications as a way to educate colleagues about United Way.
6. **Determine a campaign timeline** or calendar of activities and communicate it. (We have found that 2-3 week concentrated campaigns are the most effective.)
7. **Use incentives** to encourage giving. **Use the new 2011 United Way Giving Incentive** (ask your United Way representative for promo flyers) Hold fun special events that build enthusiasm. Consider volunteering as a team-building project. (Ask your United Way representative about volunteer opportunities for one person or a group from your organization.)
8. **Visit our website** often to gather ideas and find resources available to you at www.unitedwayriverscities.org.
9. **Promote the campaign** using tools available through United Way including posters, sample emails, guest speakers and endorsement letters.
10. **Run a special solicitation** for those who are, or have the potential to be, leadership givers (those who contribute \$500 or more annually).
11. **Wrap up your campaign** and report results within your company or organization or your United Way representative.
12. **Say “thank you” to those who contributed to the campaign and anyone who helped coordinate it. Send letters signed by the CEO; hang thank you posters; write thank you notes; and post a message on your company’s intranet or send an email.**
13. **Implement a new hires program** if you don’t have one already. Consider adding a component about United Way into your new employee orientation. (Ask your United Way representative for a new hires brochure to include in your new hires packets.)



THE 20*-MINUTE GROUP MEETING

*Note: Other meeting schedules and options are available to best fit your organization’s structure.

SAMPLE AGENDA

ITEM	PRESENTER	TIME
Opening Remarks	Employee Coordinator	2 mins.
CEO Endorsement	Company Leadership	1 min.
United Way Overview	United Way Representative	5 mins.
Campaign Video	Employee Coordinator Introduces	4 mins.
Speaker	United Way Funded Partner/ Volunteer	5 mins.
Ask for the Gift	Employee Coordinator/United Way Representative	2 mins.
Closing Comments	Employee Coordinator	1 min.

SAY THANK YOU!

Visit www.unitedwayriverscities.org for more ideas!

SAMPLE EMAIL MESSAGES

It is a good idea to use internal communication, like email, to keep employees updated on the organization’s workplace campaign progress. The following ideas will help you draft emails to staff.

This is your invitation to **LIVE UNITED™**. Be part of improving the education, health and income of people in your community. United, we stand. United, we elevate. United, we can change what we see in the world around us. **Please give to United Way. Here’s how. [Give specific information about your campaign (how to give, timeline, etc.).]**

How to **LIVE UNITED** at
[insert company name]:
**JOIN HANDS. OPEN YOUR HEART.
LEND YOUR MUSCLE. FIND YOUR VOICE.
GIVE 10%. GIVE 100%. GIVE 110%.
THINK OF WE BEFORE ME.
REACH OUT A HAND TO ONE
AND INFLUENCE THE CONDITION OF ALL.
GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED.**

[Give specific information about your campaign (how to give, timeline, etc.).]

Need help or know someone who does? United Way wants to be sure that anyone has access to information 24 hours a day, 365 days a year. 2-1-1 provides free information and referrals to human services. Dial 2-1-1 to get connected with caseworkers who can answer your questions and find community services to assist you. [Give specific information about your campaign (how to give, timeline, etc.).]

United Way is advancing the common good by focusing on education, income and health. These are the building blocks for a good life — a quality education that leads to a stable job, enough income to support a family through retirement and good health. [Give specific information about your campaign (how to give, timeline, etc.).]

United Way’s goal is to create real, lasting change that prevents problems from happening in the first place. We invite you to be part of the change. Together, united, we can inspire hope and create opportunities for a better tomorrow. [Give specific information about your campaign (how to give, timeline, etc.).] That’s what it means to **LIVE UNITED™**.

Want to make a difference? Attend [insert company name]’s United Way campaign kickoff event on [insert date] and learn more about what it means to **LIVE UNITED**. And please support United Way this year. **GIVE. ADVOCATE. VOLUNTEER.** [Give specific information about your campaign (how to give, timeline, etc.).]