

Campaign Coordinator Guide

Conducting a United Way Campaign can be easy and fun. To make your job easier, we have broken it down into manageable steps. The resources and tips provided in this guide will help you plan an enjoyable, meaningful and efficient campaign.

STEP 1

Know your organization's giving history

- ✓ Total employee dollars raised
- ✓ Percent participation & average gift
- ✓ Total corporate dollars contributed (if applicable)
- ✓ Number of Leadership Givers and how many in each level
- ✓ Special events held

STEP 2

Obtain support

- ✓ CEO and senior executives
- ✓ Committee volunteers who represent various departments
- ✓ United Way representative

STEP 3

Develop a campaign plan

- ✓ Set clear goals
- ✓ Decide on a solicitation style
- ✓ Create a Leadership Giving program
- ✓ Promote campaign and special events
- ✓ Host kick-off event/meeting

STEP 4

Educate employees

- ✓ Hold group meeting(s) and Leadership meeting(s)
- ✓ Show United Way video
- ✓ Invite a United Way speaker

STEP 5

Promote leadership giving

- ✓ Enlist support early
- ✓ Develop a plan to identify & cultivate potential leadership givers
- ✓ Host a leadership giving event to promote and set a precedent
- ✓ Recognize and publicize results

STEP 6

Ask employees to give

- ✓ Include Right Person "Ask" letter with personalized pledge form
- ✓ Solicit current and potential Leadership Givers
- ✓ Distribute personalized pledge forms
- ✓ Collect completed pledge forms at end of meeting
- ✓ Announce percent to goal achieved
- ✓ Final deadline and goal reminder

STEP 7

Say thank you!

- ✓ Post thank you posters
- ✓ Send a thank you e-mails
- ✓ Publicize final collective results
- ✓ Recognize campaign committee members

STEP 8

Report results

- ✓ Gather all completed pledge forms
- ✓ Contact your United Way representative
- ✓ Schedule a meeting to review and tally final totals
- ✓ Complete the Campaign Report Form
- ✓ Submit a copy of pledge form (white copy) to your payroll department

STEP 9

- ✓ Live United All Year Long!