

YOUR CAMPAIGN CHECKLIST



BEFORE THE CAMPAIGN

- Involve your CEO and company leadership. Recruit and train your team.
- Develop and organize your plans and strategies for the campaign. Promote leadership giving (gifts of \$1,000 or more).
- Promote and publicize your campaign. Use existing meetings and coordinate with United Way staff for communication and promotional needs. If you need something, please ask us. We're happy to help.
- Use social media to generate excitement for the campaign! Follow United Way of Greater Waterbury on Facebook and Twitter for the latest, breaking news and information.

KICK-OFF WEEK

- Hold a kick-off event and schedule employee meetings with United Way staff to talk about our work. Show the United Way campaign video.
- Distribute pledge forms and inform everyone when and where to return them.
- Make special mention of those who have been loyal contributors to United Way for 10+ and 20+ years.
- Promote incentives for various levels of giving and/or increases in giving.

MID-CAMPAIGN

- Follow-up personally with anyone who missed the employee meeting. Encourage them to watch the campaign video on our website.
- Report results as you get them so everyone can see how the campaign is going.
- Continue to promote campaign activities through email, company newsletter, or intranet.

AFTER THE CAMPAIGN

- Celebrate success with an event that recognizes new supporters and loyal contributors.
- Implement a New Hires program to give new employees a chance to donate. Also ask employees who are leaving if they would like to fulfill their pledge.
- Send thank you notes and emails.
- Subscribe to our e-newsletter on our website to stay informed of our work and activities.
- Add a link on your company's website and/or intranet to www.211ct.org so that employees and customers know where to turn for help and information.
- Encourage coworkers to visit our website to find the latest opportunities to Give, Advocate and Volunteer.
- Provide a copy of all original pledge cards to your organization's Payroll/Human Resources Department. Return all original pledge cards, as well as any gifts of cash, checks, or credit card to United Way by Wednesday, November 21.**

United Way of Greater Waterbury
100 North Elm Street, 2nd Floor
Waterbury, CT 06702-1512
(203) 757-9855
www.unitedwaygw.org

THANK YOU!

RESOURCES:

Visit our website for information and the downloadable materials you'll need to make your fundraising campaign a success including:

- Posters
- Campaign brochure
- Campaign video
- Corporate pledge card
- Listing of community partners and initiatives
- Downloadable version of this campaign coordinator guide
- Tips for conducting a Leadership Campaign
- Information about planned giving to United Way
- More information about our work in the areas of education, financial stability, and basic needs.
- Logo use guidelines
- Answers to frequently asked questions
- Social Media
- Localized 211 Statistics
- New Hires program

unitedwaygw.org

Stay informed:



GREAT THINGS HAPPEN WHEN WE LIVE UNITED.

This is your guide for coordinating a United Way Campaign in your workplace.

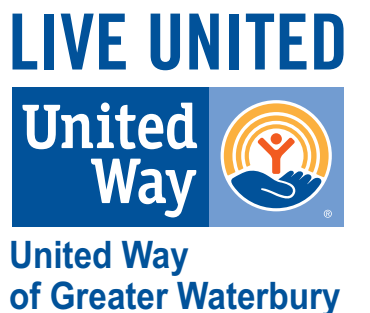
CAMPAIGN COORDINATOR GUIDE

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*Inaugural James C. Smith Spirit of Excellence Award Winner
2017-2018 Campaign*



KEYS TO A SUCCESSFUL CAMPAIGN

- » Enlist the support of your CEO.
- » Recruit a campaign team to assist you.
- » Schedule United Way training. Work with United Way staff to develop strategies and set a goal based on last year's effort and this year's workplace environment.
- » Hold employee meetings and schedule United Way staff to attend. Use the meetings and other communications as a way to educate colleagues about United Way.
- » Use incentives to encourage giving. Hold fun special events that build enthusiasm. Consider volunteering as a team-building project.
- » Visit our website often to gather ideas and find resources available to you.
- » Promote the campaign using tools available through United Way including posters, sample emails, guest speakers, and endorsement letters.
- » Run a special solicitation for those who are, or have the potential to be, leadership givers (those who contribute \$1,000 or more annually).
- » Wrap up your campaign and report results within your company/organization and to United Way.
- » **Provide a copy of all original pledge cards to your organization's Payroll/Human Resources Department. Return all original pledge cards, as well as any gifts of cash, checks, or credit card to United Way by Wednesday, November 21.**
- » 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.
- » Implement a New Hires program if you don't have one already. Consider adding a component about United Way into your new employee orientation.
- » Share United Way's Social Media Posts



INSPIRE OTHERS TO LIVE UNITED

INFORM.

Make giving personal and relevant. For instance, ask employees how many cups of coffee they purchase in a week. Would they consider donating that money to United Way to help improve people's lives?

- Make your pledge first.
- Read through United Way materials and be familiar with our work.
- Invite questions and share stories about how people are Living United. Share your own story, too.
- Add special events to your plans to get people excited about the campaign.

ASK.

Most people don't give simply because they were never asked. Personal contact and a positive attitude are critical to your campaign's success.

- Ask co-workers you know first.
- Start off with people who already donate.
- Encourage payroll deduction. It's the easiest way to give.
- **Challenge donors** to increase their giving by small amounts.
- **Provide incentives for giving.** Not all incentives need to cost money. Consider a special parking spot as a raffle prize or letting those who donate dress casually or wear jeans.

THANK.

- Send handwritten notes to donors.
- Hang United Way thank you posters throughout your building.
- Thank people personally at your wrap-up event.
- Have your CEO send thank you letters to those who contributed.

2018-2019 Campaign Co-Chairs

Grant Copeland
President & Chief Creative Officer, WORX

Ella Copeland
Youth Volunteer



SAMPLE 15-MINUTE AGENDA

EMPLOYEE MEETING	ITEM	PRESENTER	TIME
	Opening Remarks	Employee Coordinator	2 mins.
	CEO Endorsement	CEO	1 min.
	United Way Overview	United Way Representative/ Sponsored Executive	5 mins.
	Campaign Video	Employee Coordinator Introduces	4 mins.
	Ask for the Gift	Employee Coordinator/United Way Representative	2 mins.
	Closing Comments	Employee Coordinator	1 min.

MARK YOUR CALENDARS

2018-2019 Campaign Leadership Breakfast & Kick-Off
Thursday, September 6, 2018 • 7:30AM
La Bella Vista, Waterbury

Bed Races
Saturday, October 13, 2018 • 11:00AM
Waterbury City Hall, Grand Street

Annual Meeting
Wednesday, October 24, 2018 • 7:45AM
Country Club of Waterbury

Leavenworth Society Reception
Friday, November 16, 2018 • 5:30PM - 9:00PM
Country Club of Waterbury

DON'T FORGET!

Pledge cards contain confidential information and should be processed with care.