

# YOUR CAMPAIGN CHECKLIST



## BEFORE THE CAMPAIGN

- Meet with a United Way representative to review last year's campaign.
- Meet with your CEO to confirm his/her commitment and support.
- Recruit a diverse and enthusiastic campaign team.
- Develop strategies, a timeline, and goals for this year's campaign.
- Plan a Leadership Giving appeal and ask the CEO or a member of senior management to sponsor this appeal.
- Contact United Way to arrange for a speaker at employee meetings and other campaign events.
- Publicize the campaign to educate, build enthusiasm, and inform employees of key dates. Use emails or your intranet site to communicate with your co-workers.
- Send out an endorsement letter or e-mail from the CEO.



## DURING THE CAMPAIGN

- Communicate the official kickoff of your campaign.
- Display United Way posters and table tents throughout the building(s).
- Distribute pledge forms as people enter employee meeting(s).
- Make your own contribution to the campaign.
- Follow up with anyone who has not yet turned in their pledge form.
- Build excitement by sharing progress with employees.



## AFTER THE CAMPAIGN

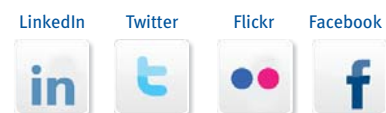
- Complete the campaign report envelope summarizing your results and return to United Way by November 1.
- Announce campaign results and thank employees with a victory celebration, email or letter.
- Evaluate the campaign's strengths and weaknesses, and make recommendations for possible improvements next year.

**Your United Way representative is available to help with everything listed in this toolkit. They are your GREATEST resource!**

**RESOURCES AVAILABLE ONLINE:** template letters, facts and stats, tips and tricks, in-house volunteer projects, speaker request forms, ideas to increase leadership giving, FAQ, eNewsletter, calendar of events, videos, Campaign Leader instructional webinars. Online toolkit at [unitedwaytriangle.org/cc](http://unitedwaytriangle.org/cc).

**STAY CONNECTED YEAR ROUND:** sign up for our eNewsletter and follow us on Facebook, Twitter, LinkedIn, etc. You'll be the first to learn about United Way of the Greater Triangle news including how your donation is making a difference in your community, special events and volunteer opportunities.

### STAY CONNECTED!



**GIVE. ADVOCATE. VOLUNTEER LIVE UNITED**  
GIVE ONLINE AT [WWW.UNITEDWAYTRIANGLE.ORG](http://WWW.UNITEDWAYTRIANGLE.ORG)



**THERE'S A WAY TO STAND UP FOR YOUR FRIENDS. YOUR NEIGHBORS. YOUR COMMUNITY. THIS IS YOUR GUIDE TO TAKING ACTION AS A CAMPAIGN LEADER.**



**CAMPAIGN LEADER TOOLKIT**  
**LIVE UNITED**<sup>®</sup>

ONLINE TOOLKIT AT [UNITEDWAYTRIANGLE.ORG/CC](http://UNITEDWAYTRIANGLE.ORG/CC)



## YOUR ROLE AS CAMPAIGN LEADER

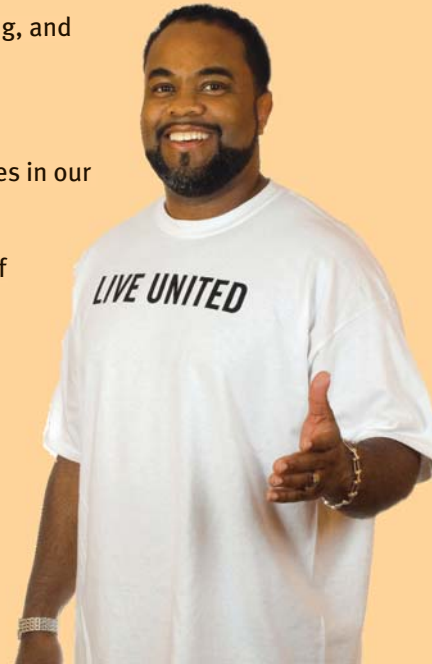
Encourage your co-workers to help build a stronger community by planning, organizing, and coordinating a successful United Way campaign within your workplace.

### Key Responsibilities

- Educate your co-workers about United Way and how we make positive changes in our community
- Promote the campaign throughout your organization
- Invite everyone to contribute; set a positive example by making a gift yourself
- Stress the importance of giving to United Way of the Greater Triangle
- Return completed pledges to United Way by November 1

### Benefits to You as Campaign Leader

- Showcase your leadership and project management skills
- Network with colleagues at various levels of your organization
- Receive communication from United Way keeping you up-to-date on the latest news in your community
- Personally take an active role to create positive impact in the Triangle



## 20-MINUTE EMPLOYEE MEETING

Sample Agenda that can be adjusted based on your timetable

ITEM	PRESENTER	TIME
Opening remarks	Campaign Leader	1 min.
CEO Endorsement	Company Leadership	1 min.
Speaker	Agency representative, volunteer, board member, or employee	5 mins.
United Way Overview*	United Way representative	5 mins.
Campaign Video	United Way representative	5 mins.
Ask for the Gift	Campaign Leader or United Way representative	2 mins.
Thank You and Closing Comments	Campaign Leader	1 min.
<b>Total Time</b>		<b>20 mins.</b>

\* most important segment if you are short on time

## EDUCATE!

Make your job easier by using these tools to show your employees why United Way is important to our community!

- Employee testimonial
- UW info in internal newsletter/intranet
- Campaign video in lunch/break rooms
- UW speaker
- UW facts thru email/voicemail
- Volunteer Project – in-house or at a nonprofit
- Poverty Simulation
- Live United Bus Tour

## MAKE IT FUN!

Increase participation in your campaign by using these fun themes and incentives!

More ideas available online!

### Themes

- Game Show
- Reality TV Show
- Flamingo Flocking
- Jail a manager
- Halloween Costume Contest
- Trivia Contest
- Hollywood
- Talent show
- Pirate Party
- Hawaiian Luau
- Live United
- Ask me about 130!

### Incentives/Raffles

- Paid Time Off
- Company café coupon
- Casual Day
- Meal served by Senior Mgmt
- Parking Space
- Movie/Game tickets
- Giveaways with company logo
- Dinner for Two

## HOW DO I TALK ABOUT UNITED WAY?

United Way of the Greater Triangle identifies local needs, builds local partnerships and invests your dollars wisely, so those who need help can find help. We create lasting change in the Triangle by addressing the underlying causes of problems, not just providing temporary solutions.

Our goal is to advance the common good in Durham, Johnston, Orange, and Wake counties by focusing on four critical impact areas, the building blocks for a good life:

**Education-** Helping youth achieve their potential

**Income-** Helping families become financially stable

**Health-** Improving people's health and wellness

**Safety-** Creating safe and secure neighborhoods



## GIVE

What you can to give people a chance at independence.

## ADVOCATE

By staying informed. Inform others. Speak out and be heard.

## VOLUNTEER

An hour. An afternoon. Give a part of yourself to make a change.

## 7 STEPS TO CAMPAIGN SUCCESS

Best Practices with a Track Record of Success

More details available online!

### 1. Get CEO and Senior Leaders Involved

- Ask company leadership for visible management support of the campaign.
- These leaders should speak at major campaign events and set a supportive tone for the campaign within their departments.

### 2. Recruit a Campaign Team

- Recruit an enthusiastic and diverse campaign team, including representatives from all departments.
- Recruiting help will make your job easier and more fun!

### 3. Develop a Plan and Set a Goal

- Review last year's results and set measurable goals for this year.
- Target areas within your company to increase participation and the average gift.

### 4. Coordinate a Leadership Giving Appeal

- Leadership giving is the easiest way to increase campaign totals and make the greatest impact in the community.
- Work with your CEO and make a targeted appeal to current and prospective leadership givers (managers, supervisors, and executives).

### 5. Focus on Education

- Connect people with the issues that are most important to them, and help them understand the impact of their contributions.
- Hold fun and educational events to help your co-workers learn about the programs United Way supports.

### 6. Ask for the Gift!

- Ask everyone to participate and make sure everyone has an opportunity to give.
- Eliminate the number one reason people do not give – that they have not been asked!
- Follow the Sample 20-Minute Employee Meeting agenda, or customize the agenda to fit the time you have available.

### 7. Thank your Co-Workers

- Saying "thank you" shows appreciation and sets a positive tone for next year's campaign.
- Schedule a celebration event as a way to thank donors and campaign team members.
- Include a thank you message in your company newsletter or on your intranet.

ONLINE TOOLKIT AT [unitedwaytriangle.org/cc](http://unitedwaytriangle.org/cc)