

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 22.**

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

SINCE 1942



Emerging Leaders

United Way's 75th Anniversary Celebration, May 3, 2017



Volunteers

United Way's 75th Anniversary Day of Action, June 21, 2017

LIVE UNITED



United Way of Greater Waterbury

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 22.**
- » 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.

2017-2018 Campaign Chair

Charles J. Boulter III
CEO, Ion Bank



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

2017-2018 Campaign Leadership Breakfast & Kick-Off
Thursday, September 7, 2017 • 7:30AM
La Bella Vista, Waterbury

Bed Races
Saturday, October 14, 2017
Waterbury City Hall, Grand Street

Annual Meeting
Wednesday, October 25, 2017 • 7:45 AM
Country Club of Waterbury

Leavenworth Society Reception
Friday, November 17, 2017 • 6:00PM
Country Club of Waterbury

DON'T FORGET!

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