

# Campaign Coordinator Checklist

## Before the campaign

- 1. Meet with your United Way Campaign Manager to review prior year's giving and develop a campaign strategy
- 2. Meet with CEO and union leader (if applicable) to confirm commitment
- 3. Establish employee campaign goal
- 4. Determine the type of campaign best suited for your company:
  - E-pledge
  - Peer-to-Peer Solicitation
  - Combination
- 5. Establish campaign timetable
- 6. Log onto [www.dayton-unitedway.org](http://www.dayton-unitedway.org) for campaign ideas and additional campaign materials
- 7. Publicize campaign and kick-off
- 8. Schedule training for solicitors (United Way staff can help)
- 9. Tour United Way Partner Agencies

## During the campaign

- 1. Hold a kick-off meeting/party
- 2. Conduct Leadership campaign with CEO and management team
- 3. Schedule employee rallies
- 4. Schedule Partner Agency tours and/or speakers
- 5. Follow-up with committee members
- 6. Issue progress reports to your employees and United Way

## After the campaign

- 1. Compile and report results to your company and United Way Campaign Manager
- 2. Evaluate results and prepare written recommendations for next year's campaign committee
- 3. Contact your committee and personally thank them for their assistance
- 4. Give yourself a big pat on the back for supporting United Way, its network of Partner Agencies and the community

*Produced in house by United Way staff*



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## What makes an award-winning campaign?

- Campaign goal of a double-digit increase
- CEO-endorsed separate Leadership Campaign
- Kick-off meetings with Partner Agency speakers
- Partner Agency tours
- Incentives
- Champion's Club (1% of gross pay)
- Year-round United Way communication to staff
- New Hires program
- Volunteering for your United Way
- Community Care Day participation (First Friday in June)

## Campaign Awards

### Pinnacle Award

The Pinnacle Award is the highest honor presented to organizations that best exemplify the vision of United Way through their spirit, involvement and leadership throughout the year.

### Upward Momentum Award

All companies that achieve a double-digit increase in their employee campaign and/or corporate gift.

### A Company That Cares Award

All companies that support our community through a United Way employee campaign and/or corporate gift.

## 20 Minute Program

### 2 minutes

*Campaign coordinator or company representative*  
Welcomes employees and explains the purpose of the campaign and how the company will support the campaign.

### 2 minutes

*Company CEO or labor leader (if applicable)*  
Provides statement(s) of support. This establishes a corporate and labor commitment to United Way and encourages company-wide participation.

### 3 minutes

*Campaign coordinator/committee member or United Way Campaign Manager*  
Provides an overview of United Way and the impact of its services. This informs the audience of the needs in our community, and offers them the opportunity to participate in addressing those needs.

### 5 minutes

*Employee testimonial or Partner Agency representative*  
First-person testimonial showing how employee contributions are making a difference and changing lives in our community.

### 5 minutes

*Campaign video*  
Raises the audience's awareness and encourages them to actively support their community by giving through United Way.

### 3 minutes

*Campaign coordinator*  
Ask employees to consider making a contribution

- Explain how pledges can be fulfilled (payroll deduction, cash, check, credit card)
- Describe incentives (optional)
- Tell employees about Leadership giving and Champion's Club and encourage them to join
- Answer questions
- Collect pledge cards or give instructions for returning cards or for e-pledge
- Thank attendees, committee and senior management

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