

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 United Way's communications and promotional materials. If you need something, please ask us. We're happy to help.

KICK-OFF WEEK

- Hold a kick-off event and group meetings. Invite guest speakers to share their stories—United Way can help arrange this. Show the United Way campaign film.
- Distribute pledge forms and let everyone know when and where to return them.
- Make special mention of those who have been loyal contributors to United Way for 10+, 15+ and 20+ years.
- Promote incentives for various levels of giving or increases in giving.

MID-CAMPAIGN

- Follow-up personally with anyone who missed the group meeting. Encourage them to watch the campaign film 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
- Encourage coworkers to visit our website to find year-round volunteer opportunities in their town

RESOURCES:

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

- Posters
- Campaign brochure
- Campaign film
- Pledge form
- Ideas for special events & incentives
- Several downloadable versions of the United Way logo
- One-page listing of our action areas, initiatives, and partners
- Sample letters for a CEO endorsement, leadership giving solicitation, and thank you
- Information about planned giving to United Way
- Accountability information and documents
- More about the work we do
- Complete listing of our partner agencies

www.uwsect.org

United Way



United Way
of Southeastern Connecticut

LIVE UNITED®
IN NEW LONDON COUNTY

Your gift goes further.

Your voice is heard loudest.

Your time makes
the most difference.

Your United Way is the place
where everyone who cares about
others can do something RIGHT
NOW.

This is your guide for
coordinating a United Way
Campaign and advancing the
common good for all.



THANK YOU!

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of Southeastern Connecticut

KEYS TO A SUCCESSFUL CAMPAIGN

- » Enlist the support of your CEO.
- » Recruit a campaign team to assist you.
- » Attend United Way training or meet one-on-one with United Way staff.
- » Develop strategies and set a goal based on last year's effort and this year's workplace environment.
- » Hold employee group meetings. 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 or organization and to United Way.
- » **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.

INSPIRE OTHERS TO LIVE UNITED

Living United means being part of the change. United Way provides the means for you to give, advocate, and volunteer in support of our work to advance the common good. Together, we can accomplish so much more than any single group can on its own.

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.



SAMPLE 20-MINUTE AGENDA

GROUP MEETING	ITEM	PRESENTER	TIME
	Opening remarks	Employee Coordinator	2 mins.
	CEO Endorsement	CEO	1 min.
	United Way overview	United Way representative/ Loaned Executive	5 mins.
	Campaign Video	Employee Coordinator introduces	4 mins.
	Speaker	United Way Agency/Volunteer	5 mins.
	Ask for the Gift	Employee Coordinator/United Way representative	2 mins.
	Closing comments	Employee Coordinator	1 min.

Frequently Asked Questions From advancing the common good to LIVE UNITED.

When should our campaign take place?

Most happen between early September and late November, but they can happen any time of the year when a company’s employee base is largest.

How long should our campaign last?

Most campaigns can be wrapped up in one or two weeks. The goal is to distribute and collect pledge cards while the United Way message is still fresh in employee’s minds.

I am limited on time to devote to a campaign. How can I work it into my busy schedule?

Utilize your United Way representative extensively. He or she is there to help you every step of the way. Let him or her know your challenges and work towards a plan to make it a great experience for you and your colleagues. Recruiting a committee is always a great way to encourage involvement and you can create work teams.

Our work environment is not conducive to holding an employee meeting. How can I involve our employees in the campaign experience?

Bring the campaign to them. Utilize emails, voice mails, and letters from the CEO/ president to encourage participation. Designate one room as the “United Way Room” and have participants play games on their breaks and turn in pledge forms for prizes. Use your company’s intranet to provide information and results.

Who decides where the donor’s dollars go?

Local volunteers - people like you - invest your donation. A caring force of trained, local volunteers, in combination with United Way professionals, devote their time to determine how your funds will have the greatest impact in our community.

When does payroll deduction start?

Payroll deduction usually runs from January 1 through December 31. Some companies use their fiscal year, however its the companies decision to determine what works best for your organization.