



CAMPAIGN COORDINATOR'S GUIDE

CAMPAIGN BEST PRACTICES CHECKLIST

Pick 2-3 best practices that you want to incorporate or grow in your campaign this year!

BUILD A RELATIONSHIP WITH UNITED WAY STAFF

Meet with United Way staff to help you assess the strengths of last year's Campaign and suggest areas for improvement. Ask for information about additional recognition opportunities.

SECURE TOP-LEVEL SUPPORT

Involve your CEO in all initial planning. Discuss budget, corporate gifts, and CEO involvement throughout the Campaign.

DEVELOP A PLAN AND SET GOALS

Plan your Campaign timeline, budget, and design your Campaign. Be creative and set achievable goals.

ORGANIZE A TERRIFIC TEAM

Recruit a committee to help. Involve friendly and outgoing employees from ALL levels and departments of your company who will build excitement for the Campaign and make sure that everyone is asked to give.

PROMOTE AND PUBLICIZE THE CAMPAIGN

Share how, where, and when to pledge and incentivize giving. Utilize and distribute United Way Campaign materials.

MAKE THE ASK: EMPLOYEE MEETINGS OR ONE-ON-ONE

Include new hires, current staff and leadership, and retirees in the asking process by providing them with pledge forms. This is the most important step. The number one reason employees don't give is because they were never asked.

PROMOTE LEADERSHIP GIVING

Encourage and recognize levels of Leadership gifts with peer-to-peer solicitation and personal asks. Successful Campaigns have heavy involvement from leadership, setting an example of participation from the top down.

WRAP UP & REPORT OUT

Announce your final results to your organization and your local United Way in a timely manner and thank everyone involved! Determine how you will collect all the completed pledge forms and check for accuracy.

RECOGNITION & THANK YOU

Sponsor a breakfast, luncheon, build your own sundae bar, or reception to thank employees. Those two simple words not only show appreciation, but also set the tone for year-round communication and next year's Campaign.

YEAR-ROUND ENGAGEMENT

Learn more about what it means to LIVE UNITED at unitedwaynela.org. Invite United Way staff to employee engagement functions year-round, if appropriate.

WHAT DO YOUR EMPLOYEES CURRENTLY EXPERIENCE?

Think about every United Way Campaign touchpoint that employees currently experience:

Receive "start of Campaign" email
See posters in the break room
Hear presentation during safety meeting, etc.

Write out what your employees currently experience that has the greatest impact:

Write out what your employees currently experience that does NOT have much impact:

Write out what experiences would be the most meaningful for your employees:

START OF CAMPAIGN

DURING THE CAMPAIGN

AFTER THE CAMPAIGN

BUILDING YOUR CAMPAIGN PLAN

Last Year's Campaign Recap	\$/% Increase	This Year's Workplace Campaign Goals
_____ # of Donors	_____	_____
_____ # of Leadership Donors	_____	_____
_____ Employee Participation Rate	_____	_____
_____ Employee Average Gift	_____	_____
_____ Raised From Employee Gifts	_____	_____
_____ Corporate Gift <i>(Or Company Match)</i>	_____	_____
_____ Special Event Dollars Raised <i>(Optional)</i>	_____	_____
_____ TOTAL CAMPAIGN DOLLARS RAISED	_____	_____

1. MEET WITH UNITED WAY STAFF

Date _____

2. DETERMINE CAMPAIGN DATES

Start Date _____ End Date _____

3. RECRUIT CAMPAIGN TEAM

(Ask individuals from different departments to champion the Campaign in their department)

- 1. _____
- 2. _____
- 3. _____
- 4. _____

- 5. _____
- 6. _____
- 7. _____
- 8. _____

CAMPAIGN TEAM COMMUNICATION PLAN

WHAT	WHEN	WHO IS RESPONSIBLE
Pre-Campaign Communications (Posters, Emails, etc.)		
Announce Campaign Start & Company Support		
Reminder of Meetings & Giving Opportunities		
Presentations/Group Meetings		
Reminder Email		
Reminder Email 2		
Last Chance to Submit Your Pledge		
Other		

CAMPAIGN TIMELINE & CHECKLIST

2-3 Weeks Before	1 Week Before
<input type="checkbox"/> Attend United Way of Northeast Louisiana Campaign Coordinator Training & receive Campaign materials.	<input type="checkbox"/> Promote and publicize your Campaign with posters and promotional materials.
<input type="checkbox"/> Review the previous Campaign's performance and determine opportunities/challenges.	<input type="checkbox"/> Send an email from your CEO to all employees endorsing upcoming Campaign.
<input type="checkbox"/> Meet with United Way Staff to develop strategies and timeline for reaching new Campaign goals.	<input type="checkbox"/> Identify an employee who is a champion for United Way to share their story at Campaign meetings.
<input type="checkbox"/> Meet with your CEO to confirm his/her commitment; share Campaign goals and confirm a corporate contribution.	<input type="checkbox"/> Consider personalizing pledge forms.
<input type="checkbox"/> Recruit and train a Campaign Team from all company departments.	<input type="checkbox"/> Plan thank you/incentives for participation with turning in pledge forms at meetings, new/increased giving, leadership giving, etc.
<input type="checkbox"/> Recruit a Leadership Chair to identify and ask current and potential Leadership Donors to maintain and grow this segment.	
<input type="checkbox"/> Establish a giving program for retirees to retain their gift.	
<input type="checkbox"/> Set dates for employee meetings & Campaign kickoff that can be attended by the CEO and all employees.	
<input type="checkbox"/> Plan your Campaign theme and any special events (optional).	

Employee Campaign!	After Your Campaign
<input type="checkbox"/> Kick off your Campaign group meetings.	<input type="checkbox"/> Wrap up Campaign and collect all pledge forms; follow up with those who did not turn in pledge forms.
<input type="checkbox"/> Ask your CEO to attend and publicly endorse the Campaign.	<input type="checkbox"/> Track results and communicate totals so far to Campaign Team.
<input type="checkbox"/> Make sure every employee receives materials and has the opportunity to give.	<input type="checkbox"/> Conduct any Special Events after the pledge form Campaign (optional).
<input type="checkbox"/> Show the United Way video.	<input type="checkbox"/> Submit Campaign report and pledge forms to your company's payroll department; Email Campaign Spreadsheet to be completed.
<input type="checkbox"/> Include your United Way Staff to explain impact.	<input type="checkbox"/> Email completed Campaign Spreadsheet to your United Way Staff Representative; keep a copy of pledge forms for your records.
<input type="checkbox"/> Collect pledge forms at employee meeting.	<input type="checkbox"/> Submit final Campaign report, pledge forms, and envelope to United Way; make appointment for pick-up/drop-off.
<input type="checkbox"/> Thank employees for their participation.	<input type="checkbox"/> Celebrate your success; thank all donors with a celebration event, letter, email, or gift.
<input type="checkbox"/> Send follow-up emails every few days to build awareness and remind of Campaign deadlines. Include community facts, employee testimonials and success stories.	<input type="checkbox"/> Conduct a Campaign debriefing with your team and United Way Staff Representative.

THANK YOU IDEAS

Think of great ways you can say “THANK YOU” to employees for participating in the Campaign. Check the ideas below that might help you get started:

- Custom-branded T-shirts
- Door Prize Drawings for Attending Meetings
- Drawing for a Cash Prize
- Drawing for a Thanksgiving Turkey
- Two-hour Early Dismissal One Friday a Month
- Employee Donation Match
- Free Lunches for a Week
- Gift Card for Dining, Gas/Groceries, or Movie Passes
- Two-hour Late Arrival Once a Month
- Lunch for All Donors
- Prime Parking Spot for a Week/Month
- Sports Events Tickets

FUN IDEAS & EVENTS (optional)

- Crazy Hat Day
- Dunk Tank
- Pizza Party
- Scavenger Hunt in the Office
- Tricky Turkey (just like Dirty Santa game)

THANK YOU

United Way of Northeast Louisiana fights for the education, financial stability, and health of every person in our community.

Join the fight at UnitedWayNELA.org



1201 Hudson Lane
 Monroe, LA 71201
 Phone (318) 325-3869
 unitedwaynela.org

939 North Trenton Street
 Ruston, LA 71270
 Phone (318) 232-0055

FOR UNITED WAY USE ONLY

Campaign Year _____

Envelope Number

ANDAR Acct# _____

United Way
 of Northeast Louisiana

CAMPAIGN REPORT

PARTIAL FINAL

INSTRUCTIONS

1. Please be sure that all information is provided.
2. Complete this report for only pledge authorizations or payments included in this envelope.
 If you receive additional pledges, you may revise this report by contacting **Resource Development** at **RD@unitedwaynela.org**
3. Please list the names and amounts of all employees who gave \$500 or more on the enclosed Leadership Form or on the campaign spreadsheet.

Firm / Organization Name & Address

Chief Executive Officer: _____ Campaign Coordinator: _____

Firm/Organization Name: _____ Telephone: _____

Firm/Organization Address: _____ Date Submitted: _____

CORPORATE GIFT		Annual Amount	FOR UNITED WAY USE ONLY
1. Paid now _____		\$ _____	
2. To be billed <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly		\$ _____	
		\$ _____	
3. SUB-TOTAL (Lines 1-2)			
EMPLOYEE GIFT	# of Donors		
4. Cash		\$ _____	
5. Checks		\$ _____	
6. Credit Cards		\$ _____	
7. Direct Bill		\$ _____	
8. Payroll Deduction Pledges: To be Billed <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly		\$ _____	
9. Total Employee Giving (Lines 4-8)		\$ _____	
10. Non-Employee Giving/Special Events		\$ _____	
GRAND TOTAL (Lines 3 + 9 + 10)		\$ _____	

THIS FORM CANNOT BE PROCESSED WITHOUT THE FOLLOWING INFORMATION

Total Number of Employees _____

Total Number of Leadership Givers _____

Number of Donors _____

Leadership List ENCLOSED NONE

Number of 1-hour givers _____

Specific Care Forms: ENCLOSED NONE

Number of 2-hour givers _____

Campaign Spreadsheet ENCLOSED EMAILED

Number of 1% givers _____

Accounting Dept. Contact _____ Title _____ Phone _____

Company Rep. Signature _____ Title _____ Phone _____

United Way NELA Staff Signature _____

PLEASE MAKE A COPY OF THIS CAMPAIGN REPORT FOR YOUR RECORDS. THANK YOU!

Lined writing area with horizontal lines.