

CAMPAIGN CHECKLIST



THANK YOU FOR BEING A CAMPAIGN COORDINATOR!

You are essential to the success of our Annual Campaign. Without you, we could not provide the critical funds needed to support our funded programs, plus our innovative initiative work.

Whether this is your first time as a Campaign Coordinator or you're a seasoned veteran, we hope this guide will help you conduct a successful campaign from start to finish.

On behalf of our organizations, United Way and all of the people served in our community, we thank you for coordinating your workplace campaign.

STEPS TO SUCCESS

Get Donors Interested

Involve your CEO: Securing top level support makes your campaign more successful.

Share the story: Educate employees by inviting a speaker to share a story about the positive impact donor dollars have on our community. Contact United Way staff to schedule a speaker.

See impact in action: Share the Campaign Video or take an agency tour. They are highly effective tools!

110% Club: Ask your employees to increase their pledge by 10%. Every pledge of at least 110% is admitted, regardless of gift size.

Make the Ask

Ask for the pledge: With new donors, ask for a first-time gift. For annual donors, thank them for their past support and encourage an increase.

Address questions and concerns: Answer questions honestly and if you don't know the answer ask United Way staff.

Leverage incentives: Employee prizes and incentives are a way to reward employees for participating. No prize is too small. Vacation days, jeans days, VIP parking and gift cards are great incentives.

Say thank you: Regardless of what the donor decides, thank them for their time.

CAMPAIGN COORDINATOR BENEFITS

- Career-building skills
- Networking opportunities
- Recognition within your organization
- Expert knowledge of the value of giving to United Way

CAMPAIGN COORDINATOR DUTIES

- Work closely with your organization's leadership
- Work closely with United Way staff
- Develop an effective campaign plan
- Recruit a team of volunteers to assist you (if needed)
- Hold campaign kickoff and recognition events
- Promote the campaign throughout your organization
- Encourage leadership giving in your campaign
- Make your campaign fun
- Thank your donors and volunteers

KEY MESSAGES

- United Way of Norman improves youth opportunity, financial security, and health for every person in our community.
- Money raised here stays here and all funding decisions are made locally.
- In addition to funding 34 local programs, United Way of Norman manages community initiatives to fill gaps and address community needs.
- Almost 87,000 people received help last year through United Way of Norman.

CAMPAIGN CHECKLIST

Plan Your Campaign	Target Date	✓
Attend United Way Coordinator Training		
Review the previous campaign's performance, determine opportunities and challenges		
Meet with your CEO, determine your participation and monetary goals, incentives for giving and get his/her personal endorsement.		
Recruit a Campaign Team (if necessary)		
Train team/Assign tasks		
Develop a Leadership Giving Campaign		
Plan Campaign Kickoff		
Schedule/Announce Campaign Kickoff		
Arrange for Agency Speaker with United Way of Norman staff		
Send reminder about Campaign Kickoff		
Ensure you have all Campaign Supplies		
Execute Your Campaign		
Hold Kickoff Event with a United Way speaker and video		
Make sure every employee receives a pledge card and has the opportunity to give		
Establish deadline for pledge cards/ePledge		
Conduct special events, fundraisers and other activities		
Share photos of employees participating in events through internal channels and social media. Make sure to tag United Way of Norman!		
Report campaign progress to employees and United Way		
Finalize Your Campaign		
Collect pledges, calculate results and submit campaign envelopes to United Way staff. Follow up with any regular donors who did not pledge		
Announce final results to employees		
Thank all donors with a celebration event, letter or email from your CEO or a visit from a United Way representative.		
Live United All Year		
Attend Day of Caring		
Attend Celebrity Sing		
Attend other United Way of Norman Events		
Offer New Hires a chance to give		
Offer Retirees a chance to continue giving		



WE'RE HERE TO HELP!

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