

› Step-by-Step Checklist

Plan Your Campaign

Target Date

- Meet with your Donor Relations consultant at Heart of West Michigan United Way.

/ /
- Develop your campaign time line with dates and goal.

/ /
- Recruit a campaign team comprised of representatives from all departments.

/ /
- Place your order to receive United Way campaign materials, go to waybetterunitedway.org/campaign-tools/php. to download additional campaign tools.

/ /
- Recruit a Leadership Giving chairperson.

/ /
- Review campaign history and set dollar, participation and awareness goals.

/ /
- Secure support of the campaign plan with your CEO and senior management team. Items to include: strategies, budget and campaign goal.

/ /
- Schedule your Kick off meeting and location and make sure it's posted on calendars including your CEO, senior leadership team, your campaign team and your Donor Relations consultant.

/ /
- Plan your organization's participation in Day of Caring or another volunteer activity.

/ /
- Schedule community speakers and tours. Your Donor Relations consultant can help you schedule speakers to educate and motivate your employees during kick off meetings.

/ /
- Work in partnership with your public relations, communications or human resource department to plan an effective campaign communication strategy.

/ /
- Conduct campaign team training in partnership with your Donor Relations consultant.

/ /
- Work with your Human Resource department to plan a retiree outreach campaign.

/ /
- Plan details of Leadership Giving campaign and identify past and prospective contributors (\$500+).

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As a Campaign Coordinator, your partnership with United Way helps to advance the common good, creating opportunities for a better life for everyone here in West Michigan.



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Run Your Campaign

Target Date

- | | |
|---|-----|
| <input type="checkbox"/> Meet with your Donor Relations consultant. | / / |
| <input type="checkbox"/> Kick off your Leadership Giving campaign. Prepare personalized contribution forms and materials as needed. | / / |
| <input type="checkbox"/> Heavily promote your campaign and activities at least 1 week before your kick-off. | / / |
| <input type="checkbox"/> Campaign Kick-Off Celebration—Remember to request a speaker to educate and motivate your employees. | / / |
| <input type="checkbox"/> Make sure that each employee is reached through group or one-on-one meetings and has the opportunity to contribute. | / / |
| <input type="checkbox"/> Schedule a mid-campaign team meeting to reflect on successes, challenges and opportunities. Adjust your campaign plan if needed. | / / |
| <input type="checkbox"/> Actively engage employees about United Way with consistent communications, events and promotions. | / / |
| <input type="checkbox"/> Keep running totals of campaign results and participation. Share on-going campaign results with employees. | / / |
| <input type="checkbox"/> Send a reminder about campaign close, and follow up with employees who have not returned their pledge forms. | / / |

*Do you know why most people don't give to United Way?
It's because they weren't asked!*

United Way's focus is on the building blocks for a good life -education, income and health. These are the basic things we all need for a better life: helping children and young people achieve their potential through education; promoting financial stability leading toward independence; and improving people's health.



Heart of West Michigan
United Way

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Close Your Campaign

Target Date

- Meet with your Donor Relations consultant.
_____ / /
- Collect (signed) pledge forms and complete the Employee Campaign Report form. Make sure your Donor Relations consultant picks it up or that you drop off forms at United Way Center.
_____ / /
- Announce final campaign results to staff.
_____ / /
- Thank employees with a letter, email or event.
_____ / /
- Thank your campaign team.
_____ / /
- Thank your leadership givers.
_____ / /
- Meet with your campaign team to gather feedback and notes for next year.
_____ / /
- Remember to promote how employees gifts are helping the community throughout the year.
_____ / /
- Promote giving to United Way to all new hires.
_____ / /
- Celebrate!

Ongoing

Target Date

- Stay informed about how your support is achieving measurable results in West Michigan by subscribing to our quarterly eNewsletter. Visit waybetterunitedway.org for more information.
_____ / /
- Meet with your Donor Relations consultant to find out more about year-round community engagement and involvement through United Way's Volunteer Center.
_____ / /

LIVE UNITED
means being part
of the change.

It takes everyone in
the community working
together to create a
brighter future.



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United Way