

# CAMPAIGN CHECKLIST

## PRIOR TO THE CAMPAIGN

- ☐ Meet with United Way representative to review last year's campaign.
- ☐ Attend an Employee Campaign Coordinator Training.
- ☐ Set up meeting with your company/organization leadership to enlist support.
- ☐ Recruit a strong and diverse campaign team.
- ☐ Plan an Everyday Heroes campaign (giving \$1/day for a year).
- ☐ Develop strategies, a timeline, and goals for this year's campaign.
- ☐ Reserve room(s) for group meetings and/or special events.
- ☐ Contact United Way to arrange for a speaker at group meetings.
- ☐ Ask a member of senior management to serve as a Leadership Giving Chair.
- ☐ **Personalize pledge forms with employee name and last year's gift.**
- ☐ Consider incentives for various levels of giving.
- ☐ Distribute emails and/or post information on company intranet leading up to the campaign to educate, build enthusiasm, and inform people of key dates.
- ☐ Send out an endorsement letter from company leadership.

## DURING THE CAMPAIGN

- ☐ Distribute personalized pledge forms as people enter the group meeting(s).
- ☐ **Run a separate leadership giving solicitation for those who have the potential to give \$500 or more annually.**
- ☐ Promote the campaign in company newsletters, intranet, and via email.
- ☐ Hang posters and update thermometers regularly.
- ☐ Make your own contribution to the campaign.
- ☐ Follow up with anyone who has not yet turned in their pledge form.

## AFTER THE CAMPAIGN

- ☐ Complete contribution report envelope summarizing your results and return to United Way.
- ☐ Hold event to wrap-up the campaign, announce results, and recognize those who volunteered and contributed.
- ☐ Send out thank you notes and/or letter signed by leadership.
- ☐ Promote the results of your campaign in company newsletters, intranet, and via email. People like to find out how they did!
- ☐ Display United Way thank you posters.
- ☐ Evaluate your results with recommendations for next year.
- ☐ Consider implementing a new hires program.
- ☐ **Post information about United Way & 'How I LIVE UNITED' stories year-round.**

# KEY TALKING POINTS

## COMMUNITY NEED

Currently, **nearly half of the households in our community struggle to get by, just one unexpected expense away from crisis.**  
Working families just above the poverty line currently **have little or no help available to them.**

## UNITED WAY SOLUTIONS

It is United Way of the Lakeshore's bold goal to **help 10,000 more working families meet their basic needs by 2025.**

We do this by:

- Investing in programs that **improve the Education, Income, and Health of our community**
- Addressing barriers to success**, such as the affordability and availability of child care, housing, and transportation. As well as finding solutions for financial literacy gaps and addressing the health and safety of the community.

## INDIVIDUAL OPPORTUNITY

**United Way of the Lakeshore unites people and resources to inspire change and build thriving communities.**

**We all can and should be a part of the change...**

**Give...**through a workplace pledge or one-time gift.

**Advocate...**educate local, state, and federal leaders on issues you care about.

**Volunteer...**share your time and talent for the greater good.

# UNITED WE WIN



United Way  
of the Lakeshore

## YOUR GUIDE TO LIVING UNITED AS A CAMPAIGN COORDINATOR





# 12 STEPS TO RUNNING A SUCCESSFUL UNITED WAY CAMPAIGN

1. Enlist the support of your company leadership.
2. Recruit a campaign team to assist you.
3. Attend United Way training or meet one-on-one with United Way staff.
4. Develop strategies and set a goal based on last year’s effort and this year’s workplace environment.
5. Hold employee group meetings (see agenda at right). Use the meetings and other communications as a way to educate colleagues about United Way. **These can be virtual!**
6. Use incentives to encourage giving. Hold fun special events that build enthusiasm. Consider volunteering as a team-building project.
7. Visit our website often to gather ideas and find resources available to you.
8. Promote the campaign using tools available through United Way including posters, sample emails, guest speakers, and Everyday Hero (\$1/day) promotions.
9. Run a special solicitation for those who are, or have the potential to be, leadership givers (those who contribute \$500 or more annually).
10. Wrap up your campaign and report results—within your company or organization and to United Way.
11. **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.**
12. Implement a new hires and retirees program if you don’t have one already. Add a component about United Way into your new employee orientation and retiree meetings.

Living united means working together to reach our mutual goals as a community. And in your role as a United Way Coordinator you are not alone—we are with you every step of the way. Please visit our website for additional resources and information. Find sample endorsement and thank you letters, United Way logos to download, ways to say ‘thank you,’ and special event and incentive ideas. Learn more about **LIVE UNITED** as a philosophy and as a way to live each moment of your day.

### Can’t find what you’re looking for?

For Muskegon, call Kara at 231.332.4003, or email at kara@unitedwaylakeshore.org  
For Newaygo, call Jim at 231.225.0318, or email at mayor@fremontmi.gov  
For Oceana, call Barbara at 231.332.4005, or email at barbara@unitedwaylakeshore.org



## THE 15-MINUTE GROUP MEETING

ITEM	PRESENTER	TIME
Opening remarks	Employee Coordinator	1 min.
CEO Endorsement	Company Leadership	1 min.
United Way Overview	United Way Representative/ Loaned Executive/Employee Coordinator	5 mins.
Campaign Video &/Or Speaker	Choose between Video or Have A United Way Agency/Volunteer Testimonial	5 mins.
Ask for the Gift	Employee Coordinator/ United Way Representative	2 mins.
Closing Comments	Employee Coordinator	1 min.

**REMEMBER TO SAY THANK YOU!**

# SAMPLE EMAIL MESSAGES

“This is your invitation to **LIVE UNITED**. Be part of improving the education, health and income of people in your community. Because united we stand. United, we elevate. United, we can change what we see in the world around us. **Please give to United Way.**”

“**Need help or know someone who does?** United Way wants to be sure that anyone has access to information 24 hours a day, 365 days a year. 2-1-1 provides free information and referrals to human services in your town. Dial 2-1-1 to get connected with caseworkers who can answer your questions and find community services to assist you.”

“How to **LIVE UNITED** at [insert company name]:  
JOIN HANDS. OPEN YOUR HEART.  
**LEND YOUR MUSCLE. FIND YOUR VOICE.**  
GIVE 10%. GIVE 100%. GIVE 110%.  
**THINK OF WE BEFORE ME.**  
REACH OUT A HAND TO ONE  
AND INFLUENCE THE CONDITION OF ALL.  
GIVE. ADVOCATE. VOLUNTEER.  
**LIVE UNITED**”

“United Way of the Lakeshore is **uniting to inspire change and build thriving communities by fighting for the health, income stability, and education of every person in our community.** United Way’s goal is to create real, lasting change that prevents problems from happening in the first place. We invite you to be part of the change. Together, united, we can inspire hope and create opportunities for a better tomorrow.

**UNITED WE FIGHT. UNITED WE WIN.”**

“**Want to make a difference?** Attend [insert company name] United Way campaign kickoff event on [insert date] and learn more about what it means to **LIVE UNITED.**  
**GIVE. ADVOCATE. VOLUNTEER.**”