



# LIVE UNITED

## United Way of Hernando County Checklist Guide for Campaign Coordinators



Thank you for your commitment to running a United Way campaign in your workplace. Here is some useful information to help you lead a successful campaign. More helpful materials are available online at

[www.UnitedWayHernando.org](http://www.UnitedWayHernando.org)

### 3 Steps to Running a Workplace Campaign

As a United Way Campaign Coordinator, you join the ranks of hundreds of other volunteers who are dedicated to making our community a better place to live. You will find your success can grow by leaps and bounds when your foundation is built on good planning, excellent execution, and employee awareness.

Whether this is your first time as a coordinator or your twentieth time, this Checklist Guide will help you get the most out of your campaign.

#### 1 Analyze and Plan

- Meet with your United Way representative
- Meet with your CEO to:
  - Send out an endorsement letter
  - Set a campaign goal (use campaign thermometer as a visual)
- Establish a campaign timeline -campaign run dates, presentation dates and times, etc. (usually within 30 days)
- Order campaign materials (contact a United Way representative to order LIVE UNITED gear)
- Recruit fellow staffers to lead as United Way Advocates
- Schedule your campaign presentations with United Way, for a representative or Partner Agency
- Host a kickoff rally! Be a pacesetter! Use posters, send e-mail notes to co-workers for weekly campaign updates, consider featuring employee testimonials when possible, and advertise your campaign internally

#### 2 Pump up Your Workplace

- Host your employee presentations (one-on-one or group sessions)
- Personally hand out all pledge forms and United Way materials
- Show a campaign video to all co-workers
- Have a United Way representative or Agency speaker share the importance of Investing in your community
- Discuss the convenience of payroll deduction
- Use testimonials, incentives, and special events to inspire giving (i.e. door prizes, jeans day, prime parking spaces, etc.)
- Collect all pledge forms (even those that are not filled out,) cash contributions, and checks.  
Be sure that:
  - All pledge forms are signed
  - All cash and checks are paper-clipped to the pledge forms

#### 3 Follow up is Key

- Follow up on all outstanding pledge forms
- Report results to United Way (donor contact information and pledge amount)
- Communicate giving results to employees, emphasizing how their dollars will affect Hernando County
- Institute a New Hires program
- Thank every supporter (including those who did not invest in UW this year) for taking the time to listen. Let them know that, on behalf of United Way and those being helped in the community- "your investment makes a true difference in changing the lives of others, and we thank you for your care and support"

