

PLAN

- ___ Attend United Way of Northeast Louisiana Campaign Coordinator Training
- ___ Meet with your United Way staff to begin planning by reviewing the prior year's giving history and set a campaign goal
- ___ Share your campaign goal and strategic plan with your CEO and/or Senior Leadership
- ___ Create thank yous/incentives for all levels of giving and consider personalized pledge forms
- ___ Select campaign dates that can be attended by the CEO, Senior Leadership, and all employees
- ___ Form a Campaign Team with Team Leaders from all company departments (see Your Campaign Team, page 7); Include Team Members/department representatives at a 1:25 ratio; Select a date for Team training, 1-3 weeks prior to campaign kickoff
- ___ Recruit a leadership chair on your team to identify and ask current and potential leadership donors to maintain and grow this segment
- ___ Establish a giving program for retirees to retain their gift
- ___ Identify an employee who is a champion for United Way of Northeast Louisiana and will share their story at campaign meetings
- ___ Plan a kickoff event to start campaign and increase enthusiasm

START

- ___ Send an email from your CEO to all employees endorsing upcoming campaign one week prior to kickoff
- ___ Place posters, promotional materials, and incentives/thank yous throughout the company and highlight on the company Intranet
- ___ Kick off the campaign!
- ___ Educate employees/colleagues about the work of United Way of Northeast Louisiana through employee meetings with United Way video and speaker and give employees the opportunity to share their success stories
- ___ Keep your company's enthusiasm going, send follow-up emails every few days during the campaign with facts about United Way of Northeast Louisiana
- ___ Collect pledge forms at employee meetings

FINALIZE

- ___ Track campaign results and communicate overall numbers to your team (you may also share more specific department results with your leadership and campaign committee)
- ___ Ensure campaign volunteers are following up with assigned staff
- ___ Prior to the campaign closing, send a reminder email from the Campaign Coordinator about the end date and to encourage giving
- ___ Collect pledge cards and data, then complete reports and prepare your company's campaign report/envelope
- ___ Submit pledge cards or data to your company's payroll department; have your United Way staff review and sign off on the pledge envelope
- ___ Keep a copy of the pledge forms for your records and return original pledge form to United Way in Campaign Envelope
- ___ Complete the United Way Employee Giving Spreadsheet and email to your United Way Staff Representative
- ___ Communicate year-round about United Way's impact on our community
- ___ Celebrate your success: Host a thank you meeting for Team Members and thank each donor
- ___ Debrief with the campaign team on findings for next year
- ___ Hold an event that recognizes and thanks employees for their generosity
- ___ Initiate an on-boarding new hire program