



United Way  
of Northeast Louisiana

**2019**

**CAMPAIGN COORDINATOR  
TRAINING WORKBOOK**

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# CAMPAIGN BEST PRACTICES CHECKLIST

**PICK 2-3 BEST PRACTICES THAT YOU WANT TO INCORPORATE OR GROW IN YOUR CAMPAIGN THIS YEAR!**

- 1 BUILD A RELATIONSHIP WITH UNITED WAY STAFF**  
Meet with United Way staff to help you assess the strengths of last year's Campaign and suggest areas for improvement. Ask for information about additional recognition opportunities.
- 2 SECURE TOP-LEVEL SUPPORT**  
Involve your CEO in all initial planning. Discuss budget, corporate gifts, and CEO involvement throughout the campaign.
- 3 DEVELOP A PLAN AND SET GOALS**  
Plan your campaign timeline, budget, and design your campaign. Be creative and set achievable goals.
- 4 ORGANIZE A TERRIFIC TEAM**  
Recruit a committee to help. Involve friendly and outgoing employees from ALL levels and departments of your company who will build excitement for the campaign and make sure that everyone is asked to give.
- 5 PROMOTE AND PUBLICIZE THE CAMPAIGN**  
Share how, where, and when to pledge and incentivize giving. Utilize and distribute United Way campaign materials.
- 6 MAKE THE ASK: EMPLOYEE MEETINGS OR ONE-ON-ONE**  
Include new hires, current staff and leadership, and retirees in the asking process by providing them with pledge forms. This is the most important step. The number one reason employees don't give is because they were never asked.
- 7 PROMOTE LEADERSHIP GIVING**  
Encourage and recognize levels of Leadership gifts with peer-to-peer solicitation and personal asks. Successful campaigns have heavy involvement from leadership, setting an example of participation from the top down.
- 8 WRAP UP & REPORT OUT**  
Announce your final results to your organization and your local United Way in a timely manner and thank everyone involved! Determine how you will collect all the completed pledge forms and check for accuracy.
- 9 RECOGNITION & THANK YOU**  
Sponsor a breakfast, luncheon, build your own sundae bar, or reception to thank employees. Those two simple words not only show appreciation, but also set the tone for year-round communication and next year's Campaign.
- 10 YEAR-ROUND ENGAGEMENT** Learn more about what it means to LIVE UNITED at [unitedwaynela.org](http://unitedwaynela.org). Invite United Way staff to employee engagement functions year-round, if appropriate.

# WHAT DO YOUR EMPLOYEES CURRENTLY EXPERIENCE?

**THINK ABOUT EVERY UNITED WAY CAMPAIGN TOUCHPOINT THAT EMPLOYEES CURRENTLY EXPERIENCE:**

- Receive “start of campaign” email
- See posters in the break room
- Hear presentation during safety meeting, etc.

**Write out what your employees currently experience that has the greatest impact:**

**Write out what your employees currently experience that does NOT have much impact:**

# WHAT DO YOU WANT YOUR EMPLOYEES TO EXPERIENCE?

WRITE OUT WHAT EXPERIENCES WOULD BE THE MOST MEANINGFUL FOR YOUR EMPLOYEES:

**START OF CAMPAIGN**

**DURING THE CAMPAIGN**

**AFTER THE CAMPAIGN**

# CAMPAIGN TIMELINE & CHECKLIST

2-3 Weeks Before	1 Week Before	Employee Campaign!	After Your Campaign
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend United Way of Northeast Louisiana Campaign Coordinator Training &amp; receive Campaign materials</li> <li><input type="checkbox"/> Review the previous campaign's performance and determine opportunities/challenges</li> <li><input type="checkbox"/> Meet with United Way Staff to develop strategies and timeline for reaching new campaign goals</li> <li><input type="checkbox"/> Meet with your CEO to confirm his/her commitment; share campaign goals and confirm a corporate contribution</li> <li><input type="checkbox"/> Recruit and train a Campaign Team from all company departments</li> <li><input type="checkbox"/> Recruit a Leadership Chair to identify and ask current and potential leadership donors to maintain and grow this segment</li> <li><input type="checkbox"/> Establish a giving program for retirees to retain their gift</li> <li><input type="checkbox"/> Set dates for employee meetings &amp; campaign kickoff that can be attended by the CEO and all employees</li> <li><input type="checkbox"/> Plan your campaign theme and any special events (optional)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Promote and publicize your campaign with posters and promotional materials</li> <li><input type="checkbox"/> Send an email from your CEO to all employees endorsing upcoming campaign</li> <li><input type="checkbox"/> Identify an employee who is a champion for United Way to share their story at campaign meetings</li> <li><input type="checkbox"/> Consider personalizing pledge forms</li> <li><input type="checkbox"/> Plan thank you/incentives for participation with turning in pledge forms at meetings, new/increased giving, leadership giving, etc.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Kick off your campaign group meetings</li> <li><input type="checkbox"/> Ask your CEO to attend and publicly endorse the Campaign</li> <li><input type="checkbox"/> Make sure every employee receives materials and has the opportunity to give</li> <li><input type="checkbox"/> Show the United Way video</li> <li><input type="checkbox"/> Include your United Way Staff to explain impact</li> <li><input type="checkbox"/> Collect pledge forms at employee meetings</li> <li><input type="checkbox"/> Thank employees for their participation.</li> <li><input type="checkbox"/> Send follow-up emails every few days to build awareness and remind of campaign deadlines. Include community facts, employee testimonials and success stories</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Wrap up campaign and collect all pledge forms; follow up with those who did not turn in pledge forms</li> <li><input type="checkbox"/> Track results and communicate totals so far to Campaign Team</li> <li><input type="checkbox"/> Conduct any Special Events after the pledge form campaign (optional)</li> <li><input type="checkbox"/> Submit campaign report and pledge forms to your company's payroll department; Email Campaign Spreadsheet to be completed</li> <li><input type="checkbox"/> Email completed Campaign Spreadsheet to your United Way Staff Representative; keep a copy of pledge forms for your records</li> <li><input type="checkbox"/> Submit final campaign report, pledge forms, and envelope to United Way; make appointment for pick-up/drop-off</li> <li><input type="checkbox"/> Celebrate your success; thank all donors with a celebration event, letter, email, or gift</li> <li><input type="checkbox"/> Conduct a campaign debriefing with your team and United Way Staff Representative</li> </ul>

# WORKPLACE CAMPAIGN GOAL SETTING

Last Year's Campaign Recap	\$/% Increase	This Year's Workplace Campaign Goals
_____ # of Donors	_____	_____
_____ # of Leadership Donors	_____	_____
_____ Employee Participation Rate	_____	_____
_____ Employee Average Gift	_____	_____
_____ Raised From Employee Gifts	_____	_____
_____ Raised from Company Match	_____	_____
_____ Corporate Gift	_____	_____
_____ Special Event Dollars Raised <i>(Optional)</i>	_____	_____
_____ TOTAL CAMPAIGN DOLLARS RAISED	_____	_____

# BUILDING YOUR CAMPAIGN PLAN

## 1. MEET WITH UNITED WAY STAFF

Date \_\_\_\_\_

## 2. DETERMINE CAMPAIGN DATES

Start Date \_\_\_\_\_

End Date \_\_\_\_\_

## 3. RECRUIT CAMPAIGN TEAM

(Ask individuals from different departments to champion the campaign in their department)

- |          |          |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

### CAMPAIGN TEAM COMMUNICATION PLAN

WHAT	WHEN	WHO IS RESPONSIBLE
Pre-Campaign Communications (Posters, Emails etc.)		
Announce Campaign Start & Company Support		
Reminder of Meetings & Giving Opportunities		
Presentations/Group Meetings		
Reminder Email		
Reminder Email 2		
Last Chance to Submit Your Pledge		
Other		



# WORKPLACE CAMPAIGN CALENDAR

SEPTEMBER 2019						
SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

NOTES

OCTOBER 2019						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

NOTES

NOVEMBER 2019						
SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

NOTES

# THANK YOU IDEAS

Think of great ways you can say “THANK YOU” to employees for participating in the campaign. Check the ideas below that might help you get started:

- Candy Bar Thank You for Turning in Pledge Form
- CEO Appreciation Lunch or Reception
- CEO/Executive Car Wash
- Day Off for Giving
- Executives Cook Out
- Ice Cream / Pizza Party
- Jeans/Casual Day
- Lunch With the Boss
- Parking Spot for United Way “Employee of the Month/Year”
- United Way or Company Branded Items

## ADD TO YOUR CAMPAIGN WITH FUN IDEAS & EVENTS (OPTIONAL)

- Boss in the Dunking Booth
- Chili Cook-off
- Costume Contest
- Desk Bingo
- Golf Tournament
- Half / Half “Split the Pot” Raffle
- Holiday Gift Wrapping
- Holiday Sweet / Casseroles Auction
- Ice Cream Social
- Parking Spot Raffle
- Pie in the Face
- Pot Luck Luncheon

# THANK YOU

United Way of Northeast Louisiana fights for the education, financial stability, health, and basic needs of every person in our community

**Join the fight at [UnitedWayNELA.org](https://UnitedWayNELA.org)**