

2023 Campaign Coordinator Action Guide

Visit unitedwaynco.org/workplace-campaign-toolkit/ for additional resources.



You are a Difference-Maker!

Campaign Coordinators are critical links between United Way of North Central Ohio (UWNCO) and employees to help bring bold impact to the lives of families and individuals in Crawford, Marion, and Wyandot. Grow your leadership and project management skills, and inspire others to make an impact in their community through your role as campaign coordinator.

IN THIS ACTION GUIDE YOU'LL FIND:

- Step-by-step instructions to plan your campaign
- Ideas and tips to make your campaign more engaging
- The best campaign tools to make the greatest impact

We hope you'll use this as the go-to resource for your campaign needs. Your UW staff representative is available to help, so please reach out to us.

Be sure to check out the Campaign Coordinator toolkit online at: unitedwaync.org/workplace-campaign-toolkit/



BE A DIFFERENCE MAKER



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= **BOLD COMMUNITY IMPACT.**

LIVE UNITED

Campaign Best Practices

Strategies that produce the best results and have the biggest impact.



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United Way
of North Central Ohio

Campaign Best Practices

- Gain CEO/Senior Leadership support
- Form a UW campaign committee
- Set a company goal
- Hold a kick-off event
- Feel comfortable articulating United Way's mission
- Utilize UW materials
- Offer a corporate match or corporate gift
- Encourage leadership level giving
- Thank donors
- Arrange partner site visits for employees
- Have effective communication with UW staff
- Offer year-round engagement opportunities for employees



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Campaign Timeline

Put strategies and action steps to a timeframe for realistic implementation.

Plan (4-6 Weeks Before Kick-Off)

- Consider an Online Workplace Campaign this year. Contact your UW Rep for details.
- Connect with your UW representative to review last year's campaign
 - Confirm dates, and type/quantity of materials required (pledge forms, information materials, etc.)
- Secure CEO and Senior Leadership support, including written endorsement (letter/email)
- Recruit your campaign team
- Host a planning meeting with your campaign team to brainstorm ways to establish campaign goals, objectives, and activity timeline
- Schedule United Way speaker(s) for staff meetings, kick-off, and Lunch & Learns
- Send staff calendar requests to attend campaign events

Gear Up (1-2 Weeks Before Campaign)

- Together with your UW Rep, provide your campaign team with training/information on United Way's Bold Goals, programming details, and engagement opportunities
- Hang any posters/promotional materials and post information for employees to easily access
- Begin campaign promotion:
 - CEO letter/email to employees
 - Your letter/email to employees, with a reminder of important dates and campaign goals/incentives

Take Action (during Campaign)

- Host your kick-off event
- Host a UW speaker (can be part of kick-off event)
- Ensure all employees get donation information (pledge forms) and incentives to participate
- Host activities, contests, etc.
- Send follow-up emails every few days to remind people of activities, track progress, and generate enthusiasm
- Send a "last call" email (final days of campaign)



Wrap-Up (1-2 Weeks After Campaign)

- Collect all pledge forms and ensure each form is signed
- Complete the following steps:
 1. Calculate results and complete "Campaign Report Envelope"
 2. Make copies of pledge forms and give them to your HR/payroll department
 3. Place original pledge forms in campaign envelope
 4. Give United Way your completed pledge envelope with original pledge forms inside
- Announce results to employees and thank them!
- Conduct a campaign debrief with your UW rep to determine next year's Campaign Coordinator, tentative campaign dates, and year-round engagement. Discuss your year-round engagement & plan for your next engagement opportunity!

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THANK YOU!

Together, we are changing lives.