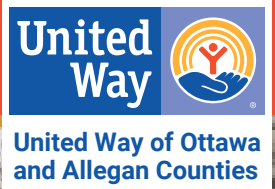


# CAMPAIGN PLANNING TOOL



## LIVE UNITED

### KEY CAMPAIGN DETAILS

Kick-off Date: \_\_\_\_\_ Relationship Manager Name: \_\_\_\_\_

Payroll Deduction Start Date: \_\_\_\_\_ Contact Information: \_\_\_\_\_

Campaign Goal(s): \_\_\_\_\_

## REACH FOR THE STARS! GOALS AND CAMPAIGN AWARDS

Use this list of campaign awards and eligibility criteria to guide your path to success:

### COMMUNITY BUILDER AWARD

- An increase in employee giving from previous year
- At least \$175.00 average employee gift
- 50% + participation by employees in campaign
- Employee volunteer involvement
- 3+ employees give at LLC level (\$500 or more)

### GOLD AWARD

- Meets 4 of 5 Community Builder Award criteria

### SILVER AWARD

- Meets 3 of 5 Community Builder Award criteria

### OUT-OF-THE-BOX AWARD

- Awarded to one corporate partner
- Creative theme
- Original activities

### ABOVE AND BEYOND AWARD

- Awarded to one EEC or Live United Committee
- EEC goes “above and beyond” to add excitement to the campaign, help others realize the importance of United Way, and encourages volunteering

### “GOLD STANDARDS” FOR CAMPAIGN SUCCESS

Follow these five evidence-based best practices to increase the success of your campaign and the impact delivered to our community:

- 1 PRESENTATIONS**  
A United Way representative or agency speaker shares impact stories and helpful info about community resources with employees
- 2 INCENTIVES**  
Even simple campaign perks can add interest and help motivate employee engagement
- 3 EVENTS**  
Special events help create enthusiasm and excitement for the campaign
- 4 COMMUNITY ENGAGEMENT**  
Through volunteer events and opportunities, employees are able to invest in their community in a hands-on and meaningful way
- 5 CORPORATE MATCHING**  
The company can show their dedication and encourage employee giving by matching a percentage or dollar amount of their employees’ donations

Contact your Relationship Manager today to discuss these five evidence-based best practices and increase the success of your campaign! See our online Campaign Toolkit at [www.oaunitedway.org](http://www.oaunitedway.org) for incentive and event ideas!

## Access campaign resources online at [www.oaunitedway.org](http://www.oaunitedway.org).



## PRIOR TO KICKOFF

- Develop campaign goals.
- Explore campaign themes and materials.
- Explore ideas for events and incentives.
- Draft strategies to meet these goals.
- Determine campaign start and end dates.

*The most effective campaigns are best kept to about 2 weeks. Starting and ending a campaign with a clear kickoff and wrap up are important factors when creating your timeframe.*

**Start:** \_\_\_\_\_ **End:** \_\_\_\_\_

- Review and approve your budget.
- Recruit a campaign team representing key departments and all levels of your company. Invite your United Way Relationship Manager to your campaign team meetings.
- Lay out campaign plan (dates, speakers, events, incentives, communications plan).
- Assign tasks to your team (Ex. communications, event coordination).
- Create energy and awareness. Begin publicizing your campaign.
- Prepare your CEO video, email or letter to your employees.

## KICKOFF WEEK

- Implement the campaign plan
- Be available to your campaign team and employees to field questions.
- Take pictures and videos and post with #LiveUnited and send to your United Way relationship manager (your photos may be shared in United Way materials).
- Thank your employees for participating.
- Have FUN, you are changing lives in our community!

## CAMPAIGN WRAP UP

- Collect all paper pledge forms.

*Ask your campaign team to follow up with colleagues who may not have returned their forms. Collecting forms from every individual, regardless of if they gave or not, will confirm that every employee had the opportunity to give.*

- Contact your United Way Relationship Manager to pick up paper pledge forms and cash gifts (in a sealed envelope).
- Ensure payroll department has collected all pledge deduction information prior to the first deduction date.
- Announce your final campaign results and thank employees for their contribution. (Ex. verbal recognition, letter, email, small gift, celebration event, etc.)
- Conduct a campaign debrief with your team and Relationship Manager. Consider conducting a survey among employees to help develop ideas and specific goals for next year's campaign.
- Congratulate yourself on a job well done!
- Your Workplace Campaign is only one of the community impact opportunities available to your employees. Talk to your United Way Relationship Manager about year round engagement.

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



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# PLAN YOUR YEAR OF ENGAGEMENT



United Way of Ottawa  
and Allegan Counties

## WINTER

## SPRING

## SUMMER

## FALL

### STEP 1:

Choose and schedule your activities or put a committee together to help decide.

### STEP 2:

Your United Way representative will contact you before your activities to make sure you have everything you need.

### STEP 3:

Celebrate your year of Community Impact with a customized annual Impact Report and awards!

### JANUARY

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### APRIL

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### JULY

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### OCTOBER

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### FEBRUARY

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### MAY

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### AUGUST

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### NOVEMBER

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### MARCH

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### JUNE

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### SEPTEMBER

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### DECEMBER

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# PLAN YOUR YEAR OF ENGAGEMENT



United Way of Ottawa  
and Allegan Counties

1. **HOST A WORKPLACE CAMPAIGN** - Help us raise the dollars that provide the vital resources our community needs.
2. **STUFF THE BUS SCHOOL SUPPLIES DRIVE** - Thousands of kids arrive at school without the supplies they need to succeed. Host a site to collect needed school supplies.
3. **EQUITY CHALLENGE** - Take a 5, 9, or 21-day personal, guided challenge on how we can be champions of equity in our personal and professional lives.
4. **VOLUNTEER OPPORTUNITIES PORTAL** - Use our online portal to find additional volunteer opportunities for your team.
5. **DAY OF CARING** - Connects corporate teams and other volunteer groups with nonprofit organizations in need of help with projects at their facilities.
6. **UNITED FOR WARMTH COAT DRIVE** - Winter makes it tough for many families, with increased seasonal costs and kids that outgrew last winter's cold-weather gear. Host a winter clothing drive to support local families.
7. **ADVOCACY** - Represent your community on a United Way Community Investment panel, committee, or task force to address the community's greatest needs or register for Advocacy Alert texts.
8. **RAKE-A-DIFFERENCE** - Pairs volunteer groups with local residents who need help with raking due to physical or financial limitations.
9. **ADOPT-A-HIGHWAY** - United Way partners with MDOT to keep our roads safe and beautiful. Join us at one of our three annual clean-ups! (\*Allegan)
10. **ADOPT-A-PARK** - Keep our parks beautiful by performing general upkeep like trash cleanup, removal of invasive plant life, and more.
11. **IMPACT TOURS** - Hop on a tour bus to see the Impact Agenda at work in your community. Virtual or in-person tours available.
12. **MAKING ENDS MEET CHALLENGE** - An interactive learning tool providing a real-life look into the struggles that thousands of families living on the edge of poverty go through every day.