

United Way Campaign Coordinator Checklist

United Way's mission is to unite and focus community resources to enhance the quality of life in Ontario County so everyone can thrive.

As a campaign coordinator, you help United Way make a measurable impact on our community — kids, families, older adults and more. Thank you! Please see the checklist below to help guide you through the United Way campaign process. Feel free to contact your United Way relationship manager at any time with questions. Thank you for your support!

- Review all campaign materials.
- Mark your calendar** with the reporting deadlines.
- Consider making your own gift first to lead by example and share about the decision or process with your co-workers.
- Set a company meeting to show the campaign film before you distribute the pledge forms.
- Personally contact anyone assigned to you, give them their pledge forms at the film presentation and ask for a contribution.
- Meet one-on-one with anyone assigned to you and explain the difference they'll make when they support United Way's Community Impact Fund.
- Ask for a donation to United Way.**
 - Hand each person a personalized pledge form.
 - Consider including one of United Way's Community Impact Fund stories.
 - Encourage co-workers to give through the convenience of payroll deduction.
 - Collect all pledge forms (even those that are not filled out), cash contributions, and checks in time to meet reporting deadlines.
- Double check . . .
 - Please make sure all pledge forms are signed.
 - Check that all bill-direct information is correct and signed.
 - Please paper-clip any cash and checks to the pledge forms.
 - Encourage employees who haven't pledged to make a decision about their contribution.
 - Turn in all forms, checks and cash to your campaign coordinator.

Please be sure to thank every supporter and each person who took the time to listen.

Let them know that, on behalf of United Way and all those being helped in our community, that your gift makes a real difference every day of the year. Please also thank those who chose not to contribute but took the time to listen.

INVEST. CONNECT. SERVE.

