

# UNITED WAY VOLUNTEER CHECK LIST

This guide helps ensure a successful United Way campaign for your assigned accounts. While not every item will be applicable, we encourage you to use this as an overall guide.

## KEY DATES AND DEADLINES

**August 21:** Volunteer training and account discussion

**August 23 – September 9:** Make initial contact with assigned accounts

**September 5:** Loons Baseball Kick-off event @ 7:05 pm

**September 9:** Campaign begins

**November 1:** Campaign ends

**TBD:** Division team meetings

## CAMPAIGN PREPARATION

1. Develop a personal statement about why you support United Way.  
*Think about your connection to the community or United Way. Is there a key issue that really speaks to you? Have you had a personal experience? Ever needed help?*
2. Be familiar with United Way messaging and themes.
3. Review division trends and individual organization trends with your staff liaison.
4. Identify companies where you have relationships—especially the existing and win-backs.
5. Work with your staff liaison to review the draft division plan.
6. Staff liaisons have made contact with most accounts prior to training.
7. Select specific accounts you will support.

## ESTABLISH INITIAL CONTACT WITH YOUR ACCOUNTS

1. Call or email your account. Introduce yourself as their UW representative for this year's campaign.
2. Speak with the employee campaign coordinator or ask for the manager
3. Set a date and time to meet with that person.
4. As needed, drop off campaign materials, including their campaign envelope and corporate donation card.
5. Sample telephone script:

Hello. My name is \_\_\_\_\_ and I'm a volunteer with United Way of Midland County. Can I speak with \_\_\_\_\_ or can you tell me who is responsible for the United Way campaign?

We live in a great community. I became involved with United Way because \_\_\_\_\_  
\_\_\_\_\_(your personal statement).

I'm inspired by their goal to ensure everyone reaches their full potential.

I would love the opportunity to share more about the issues impacted through United Way and how I can support you in making a difference.

## **SUPPORTING YOUR ASSIGNED ACCOUNTS**

1. Review the organization's giving history.
2. Briefly explain your role as a volunteer and the United Way goal/strategy.
3. Offer to support their campaign through speaking or bringing a speaker in.
4. Explain the tools available at [www.unitedwaymidland.org/resources/](http://www.unitedwaymidland.org/resources/)
5. Review last year's campaign and create strategy for this year, including a goal.
  - a. Use the Tools for Your Success
  - b. Share supplemental campaign ideas like Jean Days and Change for Change
  - c. Offer other tools and opportunities to share stories of impact.
6. Determine if they offer an incentive or matching grant for employee participation.
7. Explain the matching grant opportunities for Leadership Circle and Young Leaders United.
8. Establish the dates for their campaign (2-3 week campaigns works best).
9. Ask about their ability to provide a corporate gift (cards are in the campaign envelope).
10. Support the campaign kick-off meeting.
  - a. Utilize the generic PowerPoint (condense as needed).
  - b. Offer to arrange a UW or agency speaker through the Speaker's Bureau.
  - c. Reinforce that giving is always confidential and optional.

## **DURING THE CAMPAIGN**

1. Keep in contact with your assigned account(s).
2. Attend their kick-off and be available to answer questions and provide support.
3. Encourage them to display the goal signs and campaign posters in their office.
4. Support companies sharing progress of their campaign with employees (if needed).
5. Share that employees can also engage in the community through volunteering (all year).
6. Offer to pick up their campaign envelopes at the end of their campaign and deliver to UW.

## **AFTER THE CAMPAIGN**

1. No later than November 1st—Pick up campaign envelopes and return them to United Way.
2. Evaluate the results and capture notes for next year.
3. Attend the division wrap-up meeting. Share updated contact information, results and ideas for next year.
4. Send a thank you note to your assigned accounts.