

10

Steps to Success

1. Confirm CEO Support
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4. SET GOAL
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7. Conduct your Campaign
8. Follow-up
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A Successful Campaign Begins with You

Congratulations! You have been chosen by your company to be a United Way Campaign Coordinator for your employee group. Your selection is obviously in recognition of your dedication to accomplishment and success. You are the type of person who cares about people, who has strong organizational skills and who motivates others. You are precisely the person it takes to organize a great United Way campaign in your organization.

It is in this spirit that we offer you the following guidelines to conducting a successful United Way employee campaign. It is our hope that this information will assist you in our mutual endeavor. Your job is to increase the awareness within your organization of the tremendous health and human service needs in our community and how employees' contributions

help United Way meet those needs.

As Campaign Coordinator you will have the opportunity to:

- Learn more about the needs of your community
- Help those who wouldn't otherwise be helped
- Create an exciting campaign that will heighten the sense of teamwork and community within your workplace
- Make a difference!

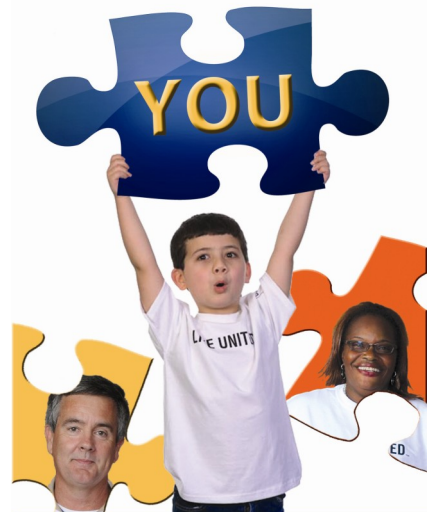
To make your job easier, we have designed this guide and scheduled this employee Campaign Coordinator training session. Please remember that this is not your only resource! A complete Campaign Coordinator Manual, and all campaign materials are also available online at www.unitedwaycoastalnc.org

When you have questions or concerns, please contact United Way of Coastal Carolina staff at (252) 637-2460. Office hours are 8:30am to 5:30pm Monday - Thursday and 8:30am to 3pm on Fridays.



We hope that the information this guide contains will help you to better understand the task ahead.

EVERY PIECE OF THE PUZZLE IS IMPORTANT



United Way of Coastal Carolina
Serving Carteret, Craven, Jones and Pamlico Counties



10 Steps to a Successful United Way Campaign

1. Confirm CEO Support



Support from your CEO or top management is crucial to the success of your organization's United Way campaign. Ask CEO to:

- send a personal letter or email to every employee, asking for their support of United Way.
- or endorse campaign personally by speaking briefly at your employee rally
- appoint next year's campaign coordinator to serve as your assistant or co-chair.
- Help determine campaign objectives and goals to be an award winning company.
- Approve payroll deduction, if it is not already being used. Payroll deduction makes a dramatic increase in campaign contributions by enabling employees to give a large contribution overall by giving a little each pay period.
- approve time for campaign activities like... (committee meetings, employee rallies, agency tours, special events)
- consider a corporate match to encourage employee participation.

SAMPLE CEO LETTER

Dear Employees:

At <x> company, it's a priority for us to do our part to help make our community the very best it can be. That's why we are a proud supporter of the annual United Way workplace campaign.

Through supporting United Way, we combine our contributions with those made by others throughout the community. The result is a united effort which will have an even greater impact than any one of us could have alone. We build the strength of our neighborhoods and of our entire community. And we change the lives of those who walk by us everyday. That's what s means to LIVE UNITED.

As an employee of <x> company, please consider a fair share gift through payroll deduction. We can be assured that our money is well spent in an effective, efficient and focused manner.

When we make the choice to LIVE UNITED, we change so many lives. Our entire community benefits when children get the early care and education they need to start school; when kids stay in school and graduate; when hard-working families are financially stable and are able to access quality health care.

I ask for your commitment to this year's United Way campaign. Together we have the opportunity to help so many of our neighbors in need. Choose to Give. Choose to LIVE UNITED!

Sincerely,

CEO
<X> Company

*other sample letters available online
www.unitedwaycoastalnc.org

2. Recruit a Campaign Team

Recruit a team to help you plan and organize the campaign. Suggested committee members should include employees from all facets of your organization, from front line workers to management.

You (2011 CC)

Next Year's CC

Last Year's CC

And representatives from:

Management

Production

Human Resources

Payroll

PR/Communications

United Way staff

2011 Campaign Information

Campaign Goal: \$500,000
Campaign Chair: Brian Donato, Moen, Inc.
Board President: Bill Eilers, Pamlico County Cooperative Ext.

United Way of Coastal Carolina Staff:

Executive Director: Sandra Phelps
sandra@unitedwaycoastalnc.org
Community Relations: Kitti Hardison
kitti@unitedwaycoastalnc.org

(252) 637-2460 telephone
(252) 637-4190 fax
www.unitedwaycoastalnc.org

3. Review Past Performance

One of the keys to planning a successful United Way campaign is to evaluate past campaigns. We have provided you with this history. Be sure to follow-up with past campaign coordinators to help answer the following questions:

Amt raised in 2010 \$ _____

Number of employees _____

Number of givers _____

% participation (# of givers divided by # of employees) _____%

Average gift (total Amt raised divided by # of givers) \$ _____

What was the level of CEO or top management involvement in the campaign? _____

Was there a major special event? _____

4. SET YOUR GOAL

Your goal should be a joint decision of the campaign team and the CEO.

Determine your 2010 Goal by using last year's stats on the history sheet (section 3) as a basis for comparison and consider the following questions:

What if . . .

- The number of new givers increased to _____?
- The number of payroll deduction givers increased to _____?
- The amount given by existing contributors increase by _____?
- The number of individuals joining the Leadership Circle (\$300+) increased to _____?
- Last year's total \$ + 10% increase in \$= _____
- Goal for 2010 \$ _____

PUBLICIZE YOUR GOAL!

5. Develop a Campaign Timeline

A timeline can help keep you and your campaign on track and in focus. The following are very important tasks that need to be assigned.

Task: **Review Past Performance**

Person Responsible: _____

Completion Date: _____

Task: **Recruit Campaign Committee**

Person Responsible: _____

Completion Date: _____

Task: **Set Campaign Goals**

Person Responsible: _____

Completion Date: _____

Task: **Choose Campaign Method**

Person Responsible: _____

Completion Date: _____

Task: **Plan Publicity and Incentives**

Person Responsible: _____

Completion Date: _____

Task: **Campaign Kickoff Event**

Person Responsible: _____

Completion Date: _____

Task: **Group Meetings**

Person Responsible: _____

Completion Date: _____

Task: **Within 48 hours, follow-up with employees who have either missed group meetings or have not turned in pledge form**

Person Responsible: _____

Completion Date: _____

Task: **Report Results to United Way (Date) _____**

Person Responsible: _____

Completion Date: _____

Task: **Conduct company-wide "thank you" effort**

Person Responsible: _____

Completion Date: _____

Task: **Evaluate campaign and provide a summary for the next CC**

Person Responsible: _____

Completion Date: _____



unitedwaycoastalnc.org

Campaign Promotional Items and supplies from United Way

- Campaign Report Envelope
- Employee Pledge forms
- United Way Agency/Program Brochures
- United Way Video
- Posters (English/Spanish)
- Goal Posters
- Thank you Posters
- Pens/Pencils
- United Way sticky pins
- 2011 NFL Schedules

United Way Store 1.800.772.0008
www.unitedwaystore.com
 for other promotional items

6. Publicize your Campaign and have Fun!

Before you go any further, you should start to build excitement about your campaign. Let everyone know you're all working toward a common goal.

Here are some of the best methods for promoting your campaign:

- Articles in your company's newsletter about your campaign and upcoming events.
- Thermometers displayed in highly visible areas, showing our campaign goal and your progress.
- Messages about your campaign through email.
- Printed campaign messages on payroll statements and envelope stuffers.

The United Way Campaign is a celebration— a celebration of caring. Get people excited about being involved. Be creative.

Some ideas to make your campaign fun and successful are. . .

Contests:

- Baby picture guessing game
- Halloween costume contest
- Chili cook-off
- Talent Show

Parties:

- Company picnic
- Pancake breakfast
- Bake Sales

Incentives/Raffles:

- Reserved parking space
- Day off for fair share givers
- Company t-shirts
- Casual day at the office
- Weekend getaways
- Silent Auction

7. Conduct the Campaign

Preparation is the key to conducting a successful campaign. All group meetings should have a specific agenda, which your United Way staff will help you organize. Below is a sample agenda for group meetings:

20-30 Minute Group Meeting

3 minutes: Welcome and campaign endorsement by CEO

3 minutes: CC thanks employees for attending, introduces Campaign Team, announces goal and reminds employees to sign and turn in pledge forms when they leave.

5 minutes: United Way video *NEW*

5 minutes: Agency Speaker or Employee testimonial

3 minutes: CC or CEO closing. Summarize importance and “Please join with me. . .”

6 minutes: Review incentives. Discuss payroll deduction option. Explain “Fair Share” level of giving. Explain pledge form

One-on-One Solicitation

One-on-one solicitation also requires Preparation and forethought. The following are suggestions for success:

1. Thank the employee for spending time with you.
2. Tell the employee your purpose in speaking with him/her.
3. Handle each and every concern or question about United Way.
4. Provide personalized pledge form And explain how to complete it.
5. Say “Thank You!”

Pledge Form Tips

By personalizing pledge forms with the employee’s name, you’ll increase your campaign’s effectiveness. That’s because:

- Employees will feel more a part of the campaign and will be more likely to give
- It will allow for easier tracking of outstanding pledge forms

To do this, plan ahead! Your payroll office may be a good source for labels. If possible, print their current payroll deduction amount on their pledge form.

8. Follow Up

- Collect ALL pledge forms, even from those who choose not to give.
- Distribute Incentives
- Thank everyone who attends, even if they don’t give
- Return all pledge forms to your department representative or team leader.
- Follow up with those who missed the meeting.

9. Report Results to United Way

Once the campaign has been completed, there are several totals that need to be turned into United Way.

Please remember to call the United Way staff at 637-2460 for any questions with paperwork.

Utilize campaign tools on the website!

www.unitedwaycoastalnc.org

To Report Results:

- Carefully complete the Employee campaign Report Envelope
- Complete Campaign Report Summary (.xls) and Leadership Report Summary (.xls) and email to info@unitedwaycoastalnc.org. Print and attach to pledge forms (canary copy)
- Put all cash, checks, credit card, stock info and “bill me” pledge cards in Campaign Report Envelope
- Return the Campaign Report Envelope to United Way (partial reports are encouraged)
- Give payroll deduction pledge cards to your payroll office (White copies)
- Ensure donors keep pledge form (pink copy) as receipt for tax purposes

10. Wrap up and say “Thank You”

The most important step in the United Way campaign is thanking those who gave! By making the givers aware of the importance of their contributions, you not only show appreciation, but encourage future giving as well. Here are some thank-you ideas:

- Report final campaign results to all employees
- Post “Thank you messages or posters in highly visible areas
- Have CEO send thank-you letter to the campaign team and employee donors
- Host a campaign-ending event with free refreshments, entertainment and awards
- Recognize significant achievements by individuals, groups or departments within the company.
- Attend United Way Awards celebration

