

# UNITED WAY CAMPAIGN COORDINATORS GUIDE

**Congratulations** on your selection to be the Campaign Coordinator for your organization's United Way campaign...and **THANK YOU** for stepping forward to undertake this most important leadership responsibility. Your leadership of the United Way Campaign will help your organization and employees make an important difference in the lives of thousands of people who are helped each year by the programs and services that are provided by the United Way and the many charitable agencies that are supported by the campaign.

This step-by-step guide will help you to plan, organize and conduct your campaign in the most effective way possible. The best practices described in this guide will also help make your job easier to enlist the support of your organization and fellow employees. Remember, "many hands make light work." Don't try to do it all alone. Get the help of your fellow workers with all the various tasks; and remember, you can always call upon the help of the Piedmont United Way office.

**What matters?...YOU matter...**and the results **YOU** achieve through your United Way Campaign.

## *The Piedmont United Way Opposes Coercion*

*The decision to donate is a personal matter. The Piedmont United Way believes that responsive volunteers and contributors are those who are well-informed about the work of the United Way and make a voluntary choice to participate in the United Way. Pressure or coercion in any form is unacceptable. A campaign that is planned and conducted in a responsible manner to effectively communicate how the United Way meets the human care needs of people in our community will ensure responsive voluntary giving.*



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# P-R-E-P-A-R-E:

## Plan→Recruit→Educate→Promote→Ask→Recognize→Evaluate

### 1. Plan

#### Review last year's campaign.

- Take a look at last year's campaign results (if you do not have them, United Way can provide them). What was the participation (how many people gave)? What was the average gift?
- Meet with last year's campaign coordinator. Ask what worked well, what could have been improved, who was on last year's team, were they dependable and enthusiastic, did you have active and visible CEO support, how was the campaign promoted?

#### Set goals and objectives for the campaign.

- Set a challenging dollar goal for the campaign and determine how you will achieve it. There are two basic ways to raise more money in a campaign – get more people to give and get people to give more.
- Prepare a campaign timetable – the shorter, the better.
- Use Best Practices. How will you communicate? How will you educate and promote? How will you ask for the contribution? How will you build enthusiasm and MAKE IT FUN?

### 2. Recruit

#### Get help from others in your organization.

- Recruit others for various tasks and use the skills and abilities of the people you recruit. People who are more generous in their giving are usually more generous with their time. Some of the tasks you can recruit others for are: Organizing the campaign meeting(s) and presentations; personalizing pledge cards; communicating and promoting/getting endorsements.

#### Secure CEO support.

- Get CEO approval of your campaign plans. Ask your CEO to provide leadership in your campaign by sending an endorsement letter to each employee, soliciting the support of top management, speaking at the campaign meeting and sending a thank you letter to each donor

### 3. Educate

#### Train Your Team.

- Make sure that your campaign team is familiar with the United Way and its programs and services. Take a tour of a United Way agency.

### 4. Promote

#### Inform Your Employees

- Put up United Way posters around your workplace. If you have an in-house newsletter, use it to provide articles about United Way agencies and the people that they help. Try to find out if any of your employees have volunteered with a United Way agency or have used their services.

#### Announce the Campaign Meeting(s)

- Make sure that all speakers/presenters know when and where. Make sure all employees are invited.
- Make sure that all preparations are in place for the meeting, including refreshments, audio/visual equipment, and United Way materials including pledge forms and brochures

# Seven Steps to a Successful Campaign

## 5. Ask

### Conduct Campaign Meetings

- The campaign meeting should take no more than 25-30 minutes. Employees are asked to make their donation decision, complete their pledge form, and turn it back in before they leave the meeting. Here is a typical Campaign Meeting Agenda:

United Way Campaign Meeting		
<i>Attendees arrive and receive pledge forms and brochures</i>		
Welcome and endorsement	3 minutes	CEO/Senior Manager
Introduce Campaign Video	1 minute	Campaign Coordinator
Show Campaign Video	5 minutes	
Introduce United Way Speaker	1 minute	Campaign Coordinator
United Way (Agency) Testimonial	10 minutes	United Way (Agency) Speaker
Pledges Requested	2 minutes	Campaign Coordinator
Employees Complete Pledge Forms	3 minutes	
Meeting Concludes		
<i>Attendees turn in pledge forms</i>		

### Follow-up with all employees

- Make sure to contact each person who did not attend the Campaign Meeting or did not turn in a pledge form. The most common reason people report for not contributing to United Way is that they were not asked. ***Make sure that everyone is asked – Don't say NO for someone else.***

## 6. Recognize

### Thank Donors

- Make sure that everyone is thanked for their contribution. Send a thank-you letter to each contributor, signed by the CEO and the Campaign Coordinator. Put up thank-you posters around your workplace.

### Thank Your Team

- Make sure that everyone who was on your campaign team is thanked personally and with a thank-you letter from the CEO and Campaign Coordinator. Consider a small thank-you breakfast or lunch for your team.

## 7. Evaluate

### Complete Campaign Reports

- Make sure to complete the Campaign Report envelope and turn it in to United Way with copies of the pledge forms.

### Make Suggestions for Next Year's Campaign

- How did your campaign perform against your goals? Did you increase participation/average gift?
- Assess what worked and make suggestions for next year's coordinator.

# Some United Way Campaign Best Practices

## Leadership Giving

When asked to make a donation to United Way, many people will want to know how much to give. Consider that a payroll deduction gift is used all year long to support the agencies' programs and services that provide help to thousands of people in our community. A little bit taken out of each paycheck goes a long way.

The basic request of United Way is for each person to consider one-hour's-pay-per month. This is equal to six-tenths of one percent of annual pay (annual pay times .006).

For the many people who are capable of giving a larger gift, or who want to make a larger donation, United Way has a Leadership Giving program called the Piedmont Society. Contributors at the leadership giving levels are recognized by the Piedmont United Way in the Annual Report and at the Annual Celebration.

Piedmont Society Leadership Giving		
Bronze Level	-	\$250 - \$499
Silver Level	-	\$500 - \$999
Gold Level	-	\$1,000 - \$2,499
Platinum Level	-	\$2,500 - \$4,999
Diamond Level	-	\$5,000 - \$9,999

## Incentives

A great way to increase campaign participation is to offer incentives. As part of the campaign you can consider a drawing for everyone who turns in a pledge. Here are some ideas that have worked in the past:

- Gift cards or certificates to local restaurants or services
- Gift Baskets using a theme or local products (may be made by fellow employees)
- Lunch with the Boss
- Company promotional products or articles of apparel
- Tickets to performances or sporting events
- A weekend away for two
- An extra day-off-with-pay
- A choice reserved parking space in the company lot

Use your imagination, you will probably be able to come up with lots more.

## Special Events

Some organizations will use special events to build employee enthusiasm and support. Consider these:

- A special campaign kickoff for employees, such as a breakfast or lunch
- An agency fair or carnival with entertainment (and with tables with agency people and information)
- A special Thank-You event such as a breakfast or lunch with the CEO

**Help is always available from the Piedmont United Way Staff:  
Call 540-825-7615 or email [campaign@piedmontunitedway.org](mailto:campaign@piedmontunitedway.org)**