

Campaign Coordinator Guide 2009–2010



United Way
of the Piedmont



Make your mark on the Piedmont.

GIVE. ADVOCATE. VOLUNTEER.

Welcome!



Thank you for joining us as an Employee Campaign Coordinator (ECC). You are a critical partner in our mission to improve lives and strengthen the neighborhoods of Spartanburg, Union and Cherokee Counties. You are the eyes, ears and the voice of the community in your workplace.

At this point, you are probably asking yourself, “So, now what do I do?” First, relax! By attending training and reading through this guide, you will have all the information you need to get started. Add to that the support that comes from United Way of the Piedmont staff and you are well on your way to a successful campaign.

As Campaign Coordinator, your primary objective is to enable your co-workers to participate in creating a stronger community by planning, organizing and coordinating a successful United Way campaign within your company.

The funds you raise support the entire community rather than a single issue. United Way of the Piedmont magnifies each individual investment in the Community Impact Fund and priority areas through:

- **innovative programs that tackle the underlying problems**
- **partnerships that produce impact on a broad scale**
- **measurable results that create meaningful, lasting improvements in lives.**

You are a champion for progress in our region, and without you we simply could not reach the numbers of people needed to create real and lasting change. We are so grateful to you for your time and commitment. Thank you for wanting to make your mark on this community and for helping others to make theirs. Best wishes for a successful campaign.

Your United Way Team

Employee Campaign Coordinator Resources and Campaign Materials

Need some information fast? How about a form letter, success story or other resources to help you manage your campaign? Just visit www.uwpiedmont.org to find these materials and more.

Pledge forms for employee workplace campaign, leadership, and Spanish language versions.

Sample letters from your CEO for workplace campaign, leadership campaigns, retiree outreach, committee recruitment, and thank you letters.

Fast Facts e-mails are a quick and easy way to help donors understand the community issues United Way is addressing and the work that workplace gifts make possible.

Presentation provides a detailed overview of United Way and its work in the community. This information can be used for education and campaign presentations.

Themes/Incentives offer recommendations and creative ideas for campaign success based on what's worked for other workplace campaigns.

what matters™ card listing provides a list of local businesses who offer discount incentives to individuals who donate \$200 or more to the Community Impact Fund or priority areas.

Goal Setting Tools provide you with additional information to assist you in calculating the appropriate goal.

Resources to assist you in responding to frequently asked questions.

Agency Directory provides a list of agencies willing to take part in health and agency fairs.

Marketing Materials such as table tents, success stories and an on-line version of the brochure can be used to spread the United Way message and to educate your associates about community issues.

Also available from your United Way representative:

Campaign video is a great tool to help launch your campaign or to reinvigorate your workplace throughout the campaign.

Posters and other logoed materials that can be placed throughout your organization to publicize your campaign.



Step 1 Confirm CEO Support

The success of your campaign depends on the commitment and involvement of your CEO. Keep your CEO involved by asking him/her to:

- Write a letter announcing his/her support.
- Attend employee group meetings to make a personal statement.
- Provide thank you recognition to Campaign Committee members and to all employees.
- Appoint a senior executive to run the Leadership campaign.
- Choose next year's campaign chair.
- Set the budget for the campaign.



Step 2 Review Past Performance

Setting a goal for your company allows you the ability to monitor and report results throughout the campaign.

When setting your United Way goal please consider these factors:

- Your company's past results
- Current company environment
- Needs of our community

Based on what you find, consider setting goals for:

- Total dollars to raise
- Percent of employee participation
- Average gift
- Giving by department
- Leadership giving
- Consider a "Stretch Goal" for your campaign

| Initial Targets | Formula |
|-----------------------------------|---|
| Minimum \$100 Per Capita* | # of Employees x \$100 = Dollar Goal |
| 75% Employee Participation Rate** | # of Employees x 75% = Participation Goal |

* Try reaching for this goal in incremental steps.

** Giving is a personal decision. The United Way discourages strong coercion tactics that result in 100% participation.

For more examples of how to measure your campaign growth and determine benchmarks for your organization, check out the "What If" worksheet on-line at www.UWPiedmont.org.



Step 3 Recruit a Winning Campaign Team

Your Campaign Committee will help you manage your organization's campaign and communicate with employees about United Way.

Recruit a campaign committee to help plan and implement the campaign.

- **Ask for volunteers.**
- **Seek dedicated, organized employees with various skill sets.**
- **Include representation from key departments in all areas and levels of your organization.**
- **Seek employees who have high energy and are well respected in your organization.**
- **Seek those who have personally benefited from United Way.**
- **Include your United Way representative on your team.**
- **Provide developmental opportunities for your team by attending United Way training sessions. Your United Way representative can customize training sessions for your team at your location or at a partner agency.**

Recruit a team of United Way Champions who can speak with associates one on one.

- **Strive for one champion for every ten employees or as low a ratio as possible.**
- **Train your champions through a brief training session led by a United Way Representative.**
- **Equip champions with valuable resources that will enable volunteers to confidently answer questions and help employees get excited about giving.**

Your Campaign Team

You

Rep. from Human Resources

Next Year's Campaign Coordinator

Rep. from Accounting

Last Year's Campaign Coordinator

Rep. from PR/ Communications

Rep. from Management

Rep from United Way

Rep. from Production



Step 4 **Develop a Plan for Success**

A well-planned campaign sets the stage for success. Campaign timelines, scheduled events, and thoughtful incentives help the

- **Large group events:** Generate excitement and educate your audience with meetings and celebrations. Plan the types of campaign meetings you will have and what schedule will work best for your organization. Think about having a fun campaign kick-off event and a wrap-up celebration to thank your donors.
- **Leadership Meeting:** Plan your Leadership Meeting as one of your first campaign activities. Visible support from this group will set the tone for the rest of your campaign.
- **Small Departmental Meetings:** It's not always possible to get the whole group together at once. Consider having departmental meetings to reach everyone and to present a message geared toward each audience.
- **Tours:** Your United Way representative can schedule tours with partner agencies before or during your campaign that will give your associates the opportunity to see their donations in action.
- **Incentives:** Use incentives as an effective tool to increase participation and to increase overall contributions.
- **Theme:** Another way to add some fun into your campaign is to create activities and promotions around a theme.

Fun campaign ideas & themes can be found at www.uwpiedmont.org.



Step 5 **Promote and Publicize**

Education and information are the keys to reaching your campaign goal.

- **Place United Way posters and table tents in key meeting areas and break rooms.**
- **Create signs and banners tailored to your company's campaign.**
- **Include campaign information in your company newsletter, website, daily e-mails or voicemail communications.**
- **Use special events and fun activities to add an additional spark to your campaign.**
- **Include employee testimonials in print or audio -visual presentation.**



Step 6 Conduct Leadership Giving Campaign

Leadership Giving is your company's greatest opportunity for campaign growth.

- **Identify potential leadership donors (those with annual salary of \$50,000 +)**
- **Consider holding a meeting at a United Way partner agency to see how dollars are invested.**
- **Consider asking a current Leadership Donor to speak at your meeting about the importance of giving at the Leadership level.**
- **Develop a plan for one-on-one meetings with all potential leadership donors.**
- **Obtain Leadership Giving Society pledge card packets from your United Way representative.**

| | | | |
|-------------------------------------|---------------------------|---------------------------------|-------------------------|
| Tocqueville Society | \$10,000 and above | Colonel Howard's Brigade | \$2,500- \$4,999 |
| Colonel Pickens' Militia | \$7,500- \$9,999 | The Patriots | \$1,500- \$2,499 |
| Colonel Washington's Cavalry | \$5,000- \$7,499 | The Continentals | \$1,000- \$1,499 |



Step 7 Make the Ask

The number one reason people do not give is because they were not asked. It is important to ask everyone and allow everyone to make an

Educate through employee meetings

- **The best way to communicate the community's needs and make the ask is by inviting a United Way staff member and agency representative to speak with your employees during a special campaign meetings or a series of campaign meetings. If campaign meetings are not possible, existing staff meetings may be used to share the United Way message.**
- **Ask your CEO to attend and publicly endorse the campaign.**
- **Make the ask!**
- **Keep the meeting lively, brief and informative.**
- **Encourage questions.**
- **Thank employees for their participation.**

Educate one-on-one

- **Some companies individually ask their employees to consider giving.**
- **Be sensitive to each person's personal interests and questions regarding United Way.**
- **United Way has tools available to assist you as you develop your talking points.**
- **Speak individually with associates who are unable to attend group meetings.**



Step 8 Report the Results

Employee follow-up and timely reporting of results is important.

- **Follow up with all employees. Ask that all pledge cards are returned to you, whether or not an individual contributes, so you will know everyone has made a conscious decision and has had an opportunity to give.**
- **Make sure Campaign Team Leaders follow up with colleagues who have not returned their cards. Use e-mail and voicemail messages as friendly reminders.**
- **Keep daily totals and give progress reports to your committee, United Way Staff and your CEO.**
- **Complete the campaign report envelope and enclose completed pledge cards or a donor spreadsheet, donor choice cards, cash, and checks. Return the sealed envelope to your United Way representative. Names and donor amounts insure that all donors are thanked and recognized appropriately.**



Step 9 Say “Thank You”

Wrap up a great campaign by thanking all those who helped accomplish the goal.

- **Make sure to recognize and thank your committee, champions, and donors.**
- **Ask your CEO to send a thank-you letter to all employees.**
- **Provide a small token of appreciation.**
- **Host a celebration!**



Step 10 Plan for Next Year’s Campaign

Getting an early start to next year’s campaign creates the foundation for an even more successful campaign for years to come.

- **Hold a debrief meeting with the Campaign Committee, CEO, and United Way staff.**
- **Implement a new-hires program to give new employees the opportunity to contribute when they join the company.**
- **Implement a year-round communications program that shares the impact of United Way’s work in the community with your employees.**

Your Campaign Timeline and Checklist



Eight Weeks Before Kickoff

- Attend the ECC training/ Meet with UW Representative**
- Meet with your CEO and/or senior management support**
- Review strategy and results from last year's campaign.**
- Meet with committee to develop a plan/assign task including: goal, timeline, publicity/ promotions, theme, activities & incentives**

Five Weeks Before Kickoff

- Develop a Leadership Giving Campaign plan**
- Discuss a retiree solicitation program with Human Resources.**

Three Weeks Before Kickoff

- Recruit and train United Way Champions.**
- Check/order campaign supplies and materials**
- Schedule speaker(s) and agency tour(s) with United Way.**
- Send solicitation letters to retirees.**

One Week Before Kickoff

- Launch campaign communications and promotional materials.**
- Send CEO communication to all employees (letter or e-mail).**
- Launch leadership campaign with separate meeting and solicitation.**
- Conduct educational/Issues seminars and agency tour(s).**

Week of Campaign Kickoff

- Hold an organization wide kickoff event to build enthusiasm for the campaign.**

Quick Tips that Make Asking Easier

Make your pledge first

When your co-workers ask if you support United Way, what will you say? If they know that you believe in and support the work of United Way, they'll be more likely to make a pledge too.

Know the facts

Read the background materials carefully. The more you know about United Way, the easier your job will be. Prepare a solicitation case. Check out United Way's web site at www.uwpiedmont.org for facts and stories that make a compelling case for giving.

Make personal contact

People give to people. Set up a face-to-face meeting to ask for a pledge. It's best not to just leave pledge forms on desks.

Be positive

Explain the benefits of giving to United Way. Stress the importance of each person's contribution to our community. Emphasize that funds are invested in programs that improve the community for all of us.

Ask co-workers you know first

Approaching people you know will help you be more relaxed and comfortable as you refine your presentation skills. The positive responses you receive will boost your confidence.

Be prepared for questions and concerns

People deserve to know that their money is being invested wisely. If you don't know the answer to a question, contact your United Way staff and get back to your colleague as soon as possible.

Retrieve all pledge forms and say Thank You!

You should collect a pledge form from every employee—whether or not the individual contributes—as a record that each has made a conscious decision. Remember to thank everyone.

Corporate Volunteer Projects

Keep your co-workers engaged all year long by offering volunteer opportunities. Your volunteers will gain the satisfaction of making an immediate impact. Your company will benefit from the increased morale and teamwork that comes from volunteering. Most important is the impact that volunteering has on individuals and families in need and the agencies who serve them.

United Way can help find volunteer opportunities that will fit your company values and workforce all year long. You may also wish to participate in United Way's scheduled volunteer activities. This is a great and direct way to make your mark on our community! For more information, call Mary Catherine Mitchell at 582-7556.

Week of Caring

The first week of September each fall is designated as United Way of the Piedmont's Week of Caring. During the week, United Way works with local corporations and groups to complete volunteer projects throughout our community.

Businesses participate by adopting a volunteer project. Projects are tailored to the interests and time constraints of your organization. We have volunteer opportunities as simple as conducting a canned good drive or as involved as repainting a room at a local shelter.

Week of Caring is a great way for associates to see a need in the community and to make an immediate difference. Projects promote a sense of teamwork and caring that directly benefits your organization.

Your United Way representative can provide you with a list of potential projects for your team!

Quarterly Volunteer Projects

Once a quarter, United Way of the Piedmont coordinates a simple collection project that gives individuals and groups an opportunity to get involved with their community. Quarterly projects are designed to require little time or money but have a huge impact on the individuals who benefit.

Your United Way representative will e-mail a project flyer to you each quarter, (February, May, August, and November) and you can always call the UWP office at 582-7556 for more information!

Campaign Awards

Circle of Excellence Award

Presented to the companies who support the United Way mission at an exemplary level through contributions, participation, non-financial contributions and quality of campaign. Circle of Excellence applications (included in this packet) must be received prior to June 1.

Employee Giving Awards

Presented in each division, based on increase in employee and employee per capita giving.

| | | | |
|--------------------------|--------------------------|---------------------------|----------------------------|
| \$1,000 – \$5,000 | \$10,000-\$15,000 | \$25,000-\$50,000 | \$100,000-\$150,000 |
| \$5,000-\$10,000 | \$15,000-\$25,000 | \$50,000-\$100,000 | \$150,000 + |

Community Impact Award

Recognizes a company in each division who has the highest percentage of undesignated employee giving.

| | | | |
|--------------------------|--------------------------|---------------------------|----------------------------|
| \$1,000 – \$5,000 | \$10,000-\$15,000 | \$25,000-\$50,000 | \$100,000-\$150,000 |
| \$5,000-\$10,000 | \$15,000-\$25,000 | \$50,000-\$100,000 | \$150,000 + |

Spartanburg School District Award

Given to the district with the greatest increase in employee giving.

Agency Award

Given to the community agency with the greatest increase in employee giving.

Outstanding Leadership Giving Award

Given to the company with the highest percent of leadership givers.

Outstanding New Campaign

Presented to the company with the most outstanding first time employee campaign. Criteria include: total employee giving, % giving to the Community Impact Fund, and participation rates.

United Way @ Work Award

Recognizes companies who have the most participation in United Way coordinated activities throughout the year.

Campaign Coordinator Award

Presented to individuals who set an example of outstanding leadership through their involvement in United Way activities.

Outstanding Campaign Committee Award

Presented to committees that demonstrate exceptional teamwork that has resulted in increased employee per capita giving.

The Volunteer Spirit Award

Presented to a company promoting the involvement of their employees in community volunteer projects.

Creativity Award

Presented to the companies who gets creative and innovative with a campaign theme and with employee involvement.

2009/2010 United Way Circle of Excellence Application

Be recognized as a company that cares about improving lives in our community.

United Way wants to honor you.

The “Circle of Excellence” is the newest and most prestigious of United Way of the Piedmont campaign awards. It applauds the organizations that support the mission of United Way at an exemplary level. This award not only recognizes financial contributions, but also the quality of the campaign, employee participation, and non-financial contributions. The organizations that receive this honor are the star supporters of United Way of the Piedmont.

Be a part of something special.

In addition to being recognized at our annual meeting and receiving an award for your company to display, Circle of Excellence companies receive special year-round recognition. We will list this circle of companies that have put extra effort into supporting the community in our marketing and support materials, campaign press releases, our web site and other public listings. We will provide you with our logo in electronic format so that you can share this honor with your employees, vendors and customers through your newsletters, web site and other tools.

If honored, your company will stand among a select group of philanthropic supporters. It takes more than just one or two great companies to provide a better quality of life in the Piedmont; it takes a circle of strong, caring companies. We hope you can be part of this honored group.

Help us honor you.

Please take time to review the Circle of Excellence criteria and complete the application at the end of your workplace campaign. Your United Way staff representative can help you calculate the giving results. This award is designed to honor companies of all sizes. Therefore, the number of employees is not a direct measure of your commitment to our community. Any organization operating within the United Way of the Piedmont service area is eligible. To receive recognition at the United Way of the Piedmont Annual Meeting, campaign results must be turned in by June 1.

Thank you for making your mark on the Piedmont.



2009/2010 United Way Circle of Excellence Application

To be part of the Circle of Excellence, your company must meet the following criteria (please check where appropriate):

GIVING

Company and employees financially support United Way by achieving the following:

Employee Giving

- Gifts directed to the Community Impact Fund, to United Way's Priority Areas, and gifts to other United Ways must total at least 70% of total employee giving
- Per capita gift is at least \$100
- At least 70% of total number of employees participate in the campaign

Corporate Giving

- The company has made a corporate contribution to United Way of the Piedmont

OR

- The company gave financial support to encourage participation in its United Way campaign.

BEST PRACTICES

Must answer "yes" to at least seven of the following twelve items regarding the current year's campaign:

- Reviewed previous campaign results to look for opportunities for growth
- CEO supported and was visibly involved in campaign
- CEO gave leadership level gift (\$1,000+)
- Campaign team was developed to plan and execute campaign
- Conducted a separate leadership giving campaign
- Set challenging campaign goal (dollars or participation)
- Publicized campaign and United Way's key messages
- Solicited 100% of employees
- Employees were given the opportunity to tour United Way partner agencies
- Had one solicitor for every 20 employees and/or held group meetings for employees
- Followed up with employees who did not respond
- Thanked employees for their gift and participation
- Provided yearround communication to employees about United Way

NON-FINANCIAL CONTRIBUTIONS

Must answer "yes" to at least three of the following five items about the current campaign:

- Employees volunteer for United Way or a United Way partner agency
- Company participates in Quarterly Volunteer Projects and/or Week of Caring projects
- Provided United Way with donors' names and addresses or e-mail addresses so United Way can personally thank your employees
- Conducted a "new hire" program offering new employees the opportunity to give
- Promoted your involvement with United Way to your customers, suppliers and other audiences (through newsletters, web site, etc.)

Yes! We qualify for the Circle of Excellence!

Company: _____ Contact Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ E-Mail: _____

Company website: _____

Please fax to 582-9826 or mail to:
United Way of the Piedmont, PO Box 5624, Spartanburg, SC 29304