

10

Steps to a Successful United Way Campaign

How to Conduct a 20-minute Campaign Meeting

ACTIVITY	RESPONSIBILITY	TIME
Show LIVE UNITED PSA	ECC	As people arrive
Welcome employees and give UW endorsement	CEO	2 minutes
Advancing the Common Good/Community Impact Report	ECC or UW Rep	7 minutes
LIVE UNITED Stories	UW Rep, ECC or Employee	5 minutes
Show Video Q & A	ECC or other company representative	4 minutes
Ask employees to fill out pledge cards and turn them in	ECC	1 minute
Thank employees for coming	ECC/CEO	1 minute

Important Campaign Dates

Campaign Kickoff – September 2008

Midpoint Report Meeting – October 2008

Final Event/Awards Celebration – January 2009

Keep checking uway.org for updates on Days of Action, Community Assembly and other United Way events

Contact Numbers

Questions? Here's who to call:

Your Loaned Executive or United Way Staff

Name _____

Phone _____

Additional Campaign Materials or Other Questions

Call 733-5400

Website Information

Go Online to Give, Advocate and Volunteer

Please take the time to visit the United Way of the Midlands website.

Campaign information is available online. Just visit www.uway.org to find out more.

Sample CEO Letter

Dear (Company Name) Employee,

On (Insert date), the 2008 (Company Name) United Way campaign begins. I want to extend my personal thanks for your past involvement and encourage your continued support this year.

Over the years, our employees have built a tradition of support and commitment to the Midlands, and it is important that we continue to build on this. We have helped to start a movement to LIVE UNITED, a movement that inspires hope and creates opportunities for a better tomorrow.

Your contributions to Community Impact help to fund programs that create long-lasting changes by addressing the underlying causes of problems. Through a network of certified partners, volunteers, donors and advocates, United Way works to ensure that everyone has the basic things we all need for a good life: a quality EDUCATION that leads to a stable job, INCOME that can support a family through retirement, and good HEALTH.

A perfect example is this year's Volunteer Income Tax Assistance program: 72 volunteers filed 1,482 tax returns for free, a value of \$296,400. They also helped eligible Midlands residents claim more than \$626,000 in total refunds and more than \$282,428 in federal Earned Income Tax Credits.

Please continue to LIVE UNITED and support United Way. Your contributions of money, time and talent can make a valuable difference in someone's life. And together, we can magnify that difference many times over.

Sincerely,

CEO



1800 Main Street
Columbia, SC 29201

(803) 733-5400 or 1-866-GET-UWAY

Fax: (803) 748-7284

www.uway.org

2008 Employee Campaign Coordinator Training Guide



United Way
of the Midlands

STEP 1 Recruit a Campaign Committee

Your campaign committee should include employees from all facets of your organization, from front line workers to management.

Your Name

Leadership Giving Coordinator

Next year's ECC

Last year's ECC

Last year's Leadership Giving Coordinator

Representative from Management

Representative from Human Resources

Representative from Accounting

Representative from PR/Communications

Your UW Staff or Loaned Executive

STEP 2 Confirm CEO Support - Ask your CEO to:

- Help determine campaign objectives and goals to be an award-winning company
- Write a letter encouraging employees to contribute
- Support recruitment of campaign committee
- Attend employee meetings to make a personal statement of support
- Appoint a Leadership Giving Coordinator
- Provide recognition to Campaign Committee members and write a thank you letter to all employees who participated in the campaign
- Determine amount of corporate contribution

STEP 3 Review Past Performance and Calculate Goal

Amount raised in 2007 _____

Number of employees _____

Number of givers _____

Percent of participation _____

Average gift _____

Per capita gift _____

Number of Leadership Givers _____

Percent of campaign raised by Leadership Givers _____

Questions to ask

How does your company compare with other companies in your division?

What are your company's strengths?

In what areas could your company improve?

What changes have occurred since last year (new hires, reorganization, layoffs, etc.). Consider the above in developing goals for the 2008 campaign.

Last year's dollar total plus a 10% increase in contributions = \$ _____

Goal for # of new givers _____

Goal for average gift _____

New average gift \$ _____ x number of givers _____ = \$ _____

2008 Campaign Goal \$ _____

STEP 4 Campaign Timetable

- Notify Campaign Committee and CEO of dates for United Way Kickoff, Days of Action, Midpoint Report Meeting and Final Event
- Establish dates for Leadership Campaign
- Establish employee campaign group meeting dates. Plan a short, intensive campaign no more than 5-10 days for companies with 100 or fewer employees

- Schedule speakers through United Way for employee meetings or tours of agencies
- Set campaign end date and schedule a time to turn in your final report to United Way

STEP 5 Volunteer, Take Tours, Use LIVE UNITED Speakers

One of the best ways to get employees interested in and excited about the United Way campaign is to let them volunteer in or tour United Way-funded programs to see firsthand how their money makes an impact in the Midlands community.

United Way Representatives in your campaign meeting allow your employees to ask questions and hear about services being provided through funded programs.

Setting up a tour or speaker is easy. Just let us know the date you prefer and how many employees will be going on the tour. Please give one week notice, if possible.

Testimonials from employees who have either received help or volunteer with an agency are very helpful when educating people about the importance of giving.

STEP 6 Publicize the Campaign

- Through e-mails
- In employee publications
- In special displays around the workplace
- Using United Way posters and materials
- Using thermometers to track progress
- By showing the campaign video
- Using incentives to encourage giving
- By promoting the **Community Investment** card (formerly the what matters.® card) for \$180+ Community Impact Donors
- Using special promotional items that can be ordered from United Way

- By encouraging employees to visit United Way of the Midlands online at www.uway.org
- By soliciting How I LIVE UNITED stories from employees

STEP 7 Conduct a Leadership Giving Campaign

- Schedule a separate meeting, breakfast, lunch or other gathering for those at higher salary levels
- Develop list of prospects
- Send CEO invitation 1-2 weeks in advance to current leadership givers and prospects. Ask for an RSVP.
- Consider the target audience for Young Leaders Society (age 21-45)
- Consider holding a meeting at a partner agency to see firsthand how United Way dollars are at work
- Schedule Palmetto or Tocqueville Society speaker
- Develop a plan for one-on-one follow-up with both those who attended meeting and those who did not.
- Thank and recognize all Leadership Givers

Obtain from United Way:

- Personalized Leadership Giving pledge forms for all current givers and prospects as well as brochures and materials.

STEP 8 Conduct Employee Campaign

- 1-2 weeks prior to date of employee campaign, send the CEO letter (SEE SAMPLE)
- Secure incentives from local restaurants, museums, etc.
- Personalize pledge cards
- Schedule and conduct employee meetings
- Show the campaign video

- Use guest speakers (LE's, agency representatives, company employees who have been on tours, UW staff)
- Encourage giving at suggested giving guide (1%)
- Conduct follow-up solicitation. Make sure every employee has been given the opportunity to contribute.

Obtain from United Way

- Report envelopes
- Employee pledge forms
- United Way brochures
- Video/DVD
- Posters
- Thermometers
- Banners
- Spanish-language materials
- Web banner ads

STEP 9 Report Results to United Way

- Carefully complete the Employee Campaign Report Envelope
- Put all cash, checks, credit card, special events money, and 'bill me' pledge forms in the Campaign Report Envelope

Be an Award Winner!

Awards Criteria

Best of Class Award – Based on number of employees and the following four criteria:

- Total Dollars Raised
- Percent Participation
- Employee Per Capita
- Percent Increase – \$ or participation

Employee Per Capita Awards

Gold Award	\$150+
Silver Award	\$100-149
Bronze Award	\$50 to 99

Merit Award – Double digit increase, at least \$500 over previous year's results and not qualified for an award in another category.

Premier Award – Organization conducts a first time workplace campaign in excess of \$250.

- Complete the information on the front of the envelope. Be sure to note the number of employees, billing information and frequency of employee payroll payment.
- Return the Campaign Report Envelope to your United Way staff person or to your Loaned Executive
- Give the yellow copy of the payroll deduction pledge forms to your payroll office
- Partial reports are encouraged throughout the campaign

STEP 10 Wrap Up & Say Thanks

- Report final results and thank employees through department meetings, company newsletter, posted communications or e-mail messages
- Distribute CEO's thank you letter to all employees
- Thank all donors with United Way pins
- Recognize and thank your Campaign Committee
- Evaluate your campaign results and prepare recommendations for next year's ECC