

Campaign Coordinator's Guide



LIVE UNITED

CHANGE WON'T HAPPEN WITHOUT YOU
HELP CREATE OPPORTUNITIES
FOR A BETTER LIFE FOR ALL

GIVE. ADVOCATE. VOLUNTEER.
www.wapellocouw.org

United Way
of Wapello County



You are making an impact in our community

The United Way annual campaign is about bringing people together to address our community's most important issues. As a United Way Campaign Coordinator, you stand alongside hundreds of other volunteers who are dedicated to making a measurable impact in the lives of people in our community.

Due to the success of the workplace campaign, the generosity of our donors, and the dedication of our volunteers, United Way helps to provide funding for over 30 programs administered by United Way and 12 not-for-profit agencies. These programs are hard at work every day improving lives and advancing the common good right here in Wapello County.

This handbook focuses on the role and responsibilities of a Company Campaign Coordinator. It is designed to lead you step-by-step through a United Way Campaign while offering tools, tips, and best practices to ensure success. While this guide offers a good overview of the United Way Campaign, it does not answer every question. More resources are available at our online toolkit and through your United Way representative.

Thank you for volunteering to be a part of the annual United Way Campaign. By giving your time, talent, and spreading the word, you are helping to advance the common good. Together, united, we can inspire hope and create opportunities for a better tomorrow.

That's what it means to **LIVE UNITED**.

Best Practices

Campaign Meetings

The most successful United Way campaigns have one thing in common, they all utilize employee meetings to build awareness and excitement around the campaign. These presentations are essential to the success of your campaign.

Planning Considerations

- Tag onto an existing meeting to make efficient use of company time.
- Keep the meeting between 15 and 20 minutes.
- Contact your United Way representative who can supply pledge forms, brochures, posters, and other materials.
- Ask your United Way representative to speak during employee meetings to expose employees to the mission, programs, and resources provided by United Way.
- Communicate campaign details such as timeframe, incentives, and other events.
- Follow up individually with employees who missed the meeting.

Sample Agenda

- Opening remarks - Campaign Coordinator and/or CEO
- United Way Overview - United Way Representative
- Pledge Form Review - United Way Representative or Campaign Coordinator
- Campaign details - Campaign Coordinator
- Closing Remarks - Campaign Coordinator and/or CEO

Presentation Checklist

- Secure a time, date, and location for the meeting.
- Promote the meeting to employees.
- Gather campaign material.
- Prepare an agenda for the meeting.
- Secure the attendance of company leadership and your United Way representative.

Follow-up Check List

- Collect pledge forms and cash or checks.
- Distribute incentives.
- Follow-up with individuals who did not return their form.
- Tally your results and schedule a meeting with your United Way representative.

Your United Way staff is available to help with everything listed in this tool kit. They are your GREATEST resource. Resources available online: [pledge forms, community report, tips and fund raising ideas, volunteer projects and more.](#) Phone 641.682.1264 or email uwvc@wapellocouv.org.

Campaign Basics: 10 Steps to Success

Congratulations on being selected as your company's Company Campaign Coordinator (CCC.) Not only are you providing a tremendous service to your company or organization, but your efforts will make a difference, improving lives and building a stronger community. Follow these 10 steps to ensure the success of your campaign.

1. Meet with CEO and Confirm Your Campaign Committee

Talk to your company's leadership about approving a campaign committee and budget and allowing use of company time for campaign meetings and activities. Your Campaign Committee should include employees from all divisions and levels as well as Loyal Contributors (anyone giving 10 years or more) of your organization.

2. Confirm Senior Management Support and ask your CEO to

- Help determine campaign objectives and goals to be an award-winning company
- Support recruitment of Campaign Committee
- Appoint a Leadership Giving Coordinator
- Write a letter encouraging employees to join him or her in contributing (see sample letter in the online toolkit)
- Attend employee meetings to make a personal statement of support
- Provide recognition to Campaign Committee members and write a thank you letter to all employees who participated in the campaign
- Determine amount of corporate matching and donation

3. Review Past Performance and Calculate Goal

Amount raised last year \$ _____ % of participation _____
of employees _____ Average gift _____
of givers _____ # of Leadership Givers _____
% of campaign raised by Leadership Givers _____
What are your company's strengths? _____
In what areas could your company improve? _____
Identify any company changes since last year (new hires, reorganization, layoffs, etc.). Consider the effect of any changes in developing goals for this year's campaign. _____

4. Establish a Campaign Timetable

- Notify Campaign Committee and CEO of dates for United Way of Wapello County (UWWC) events
- Establish employee campaign group meeting dates
- Schedule speakers from agencies for employee meetings or tours of agencies
- Set campaign end date and schedule a time to turn in your final report to UWWC facts.

5. Engage Employees with Agency Tours and Speakers

- A great way to engage employees in the United Way campaign is to offer tours of United Way partner agencies to see firsthand how their money makes an impact in Wapello County.
- Agency speakers also allow your employees to hear from those providing services.
- Setting up a tour or speaker is easy. Just let your United Way staff member know the date(s) you need and how many employees will be going on the tour. Please give two weeks notice, if possible (contact us at 641.682.1264 to set these up).
- Testimonials from employees who have either received help or volunteered with an agency are very helpful when educating people about the importance of giving.

6. Publicize the Campaign

- Emails and employee publications
- United Way posters, brochures and materials (available online)
- Live United goal poster to keep track of your campaign's progress
- Promotional items can be ordered from United Way Worldwide at www.unitedwaystore.com
- Incentives to encourage giving

- Promote Leadership Giving - an annual gift of \$500 or more, only \$20.84 when paid twice a month
- Encourage employees to visit the United Way of Wapello County website at www.wapellocouw.org

7. Conduct Employee Campaign

- 1-2 weeks prior to date of employee campaign, send out the CEO letter (See sample CEO letter on website)
- Secure incentives from local restaurants, museums, etc.
- Personalize pledge cards
- Schedule and conduct employee meetings or an all-employee kickoff (See sample meeting agenda on website)
- Use guest speakers (agency representatives, company employees who have used agency services, UWWC staff)
- Encourage Leadership Giving and share gift amount information with all employees
- Conduct follow-up with employees, to ensure every employee has been given the opportunity to contribute

8. Inform Employees about Leadership Giving

Leadership Giving exemplifies the spirit that makes our community a great place to live and work.

Leadership Givers receive recognition in the following categories:

Bronze: \$300-\$700	Bronze Plus: \$701-\$999
Silver: \$1,000-\$1,499	Silver Plus: \$1,500-\$2,499
Gold: \$2,500-\$4,999	Platinum: \$5,000-\$9,999
Tocqueville Society: \$10,000 or more	

- Ask the CEO to personally lead an informational briefing or send a letter explaining Leadership Giving to all employees before the regular campaign starts
- Be sure to let them know about all the levels and if possible, offer an incentive or prize to employees who pledge early
- Identify employees whose current giving level is close to the next leadership level, and encourage them to contribute at the next level, using incentives whenever possible.

9. Report Results to United Way

- Complete and sign the Campaign Report (directions on Campaign Report Return Envelope). You may complete the online form at www.wapellocouw.org/campaignreport. Remember to print and sign the Campaign Report.
- Give Yellow Copy of Pledge Form to your payroll office for deductions to begin.
- Place cash/checks and pledge forms reported in the appropriate envelope then place in the Campaign Report Return Envelope.
- If pledge cards are not enclosed, submit the Leaders in Giving (LIG) Members form or email a spreadsheet.
- Seal Campaign Report Return Envelope and staple the signed Campaign report and one copy to the front. Retain one copy.
- Return your Campaign Report Return Envelope to your UWWC staff.

NOTE: Be sure to have employees keep a copy of the pledge card for their tax records, give the second copy to your payroll department so that deductions will begin next year and return the original white copy to UWWC in an effort to acknowledge and recognize donors.

10. Recognize and Say Thanks

- Report final results and thank employees through department meetings, company newsletter, "Thank You" poster and/or email messages
- Distribute CEO thank you letter to all employees and donors
- Provide recognition items to all Leadership giving donors and Loyal Contributors
- Recognize and thank your Campaign Committee
- Evaluate your campaign results and prepare recommendations for next year's CCC

Campaign Materials and Resources

We understand that people are busy and the United Way campaign is in addition to all of your other job responsibilities. With that in mind we want to give you all the tools, resources, and help, you need to make your campaign a success without becoming a burden.

United Way Brochures

Offers a brief United Way overview and lists the programs and affiliated agencies supported by United Way.

Posters

Use to promote the campaign and decorate for employee meetings and special events. The backside says thank you for use at the completion of the campaign.

Banners

Large banners can be borrowed for use during kick-off events and employee meetings.

Pins and Stickers

Use these to thank your donors when they complete their pledge.

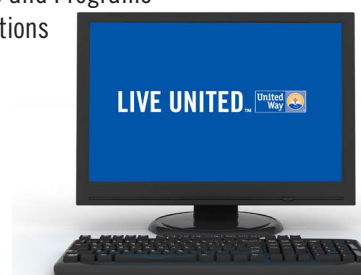
Sample emails, letters, memos, agendas

Are also available in the online toolkit at www.wapellocouw.org -choose CAMPAIGN and then Campaign Coordinator Toolkit.

LIVE UNITED success stories

These quick stories can be printed or sent via email to demonstrate United Way's success in the areas of education, income and health.

- About Your United Way
- Mission, Vision and Strategic Objectives
- What we do
- United Way Focuses on the Building Blocks for a Good Life; Education, Income and Health
- Community Initiatives and Programs
- Frequently Asked Questions



To find the online toolkit, visit

www.wapellocouw.org.

choose **CAMPAIGN** and then **Campaign Coordinator Toolkit**.

Year Round Involvement

At United Way we want to engage employees in philanthropy year-round, not just during the annual campaign. United Way offers you and your employees numerous ways to get involved in the community through giving, advocating, and volunteering. Here are some ways that you can continue the momentum built by your campaign through the rest of the year.

- Get employees involved in United Way's Done in a Day, Day of Caring, or other volunteer opportunities coordinated by our Volunteer Center.
- Stay connected year round: Follow us on Facebook and Twitter. You'll be the first to know about United Way of Wapello County news including how your donation is improving your community by advancing education, income and health. You will also keep up to date on special events and volunteer opportunities!

- Publish United Way success stories and news updates in the employee newsletter and around the office.
- Hold Brown Bag seminars to educate employees about health and human service topics that interest them.
- Encourage employees to volunteer individually for United Way's Community Investment Teams and/or Campaign Cabinet.
- Participate in United Ways' Day of Action.
- Send a group of employees to United Way's Annual Meeting to network with other community supporters.

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BETTER LIFE FOR ALL.
THAT'S WHAT IT MEANS TO LIVE UNITED.**



<http://www.facebook.com/#!/UWWC1264>



<https://twitter.com/#!/UWWC>

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**ADVANCING EDUCATION
INCOME AND HEALTH**