

STEP-BY-STEP PRACTICES

1.

GETTING STARTED

- Attend United Way's Campaign Coordinator training.
- Get to know your organization's United Way history by reviewing company profile.
- If new, talk to last year's coordinator and find out what worked and what didn't work.

2.

ENLIST SUPPORT

- Encourage your CEO to speak at your employee group meetings about the benefits of giving to United Way, or write a letter of support (sample letter page 19).
- Recruit committee representatives from different departments in your organization. Remember the benefits of TEAM – Together Everyone Accomplishes More!
- Define the role of your volunteers and how much time they will commit to the campaign.
- Find out if your company has a matching gifts program.
- Arrange for support and materials from United Way.
- Ensure succession planning. Ask your CEO to appoint next year's coordinator to help you.

Additional Resources

- A United Way staff member or volunteer can provide campaign materials, information, and support.
- Present and/or arrange for a funded program speaker to present at your employee meetings.
- Find resources at the United Way Store: www.unitedwaystore.com.
- Download campaign materials at: www.unitedwayvgu.org/campaigntoolkit.

3.

SET CLEAR GOALS AND DEVELOP A CAMPAIGN PLAN

The most successful United Way campaigns have measurable goals. Work with your United Way staff member to analyze the results of last year's campaign and set goals based on where you can make the greatest improvements.

- Increase participation.
- Leadership gifts.
- 100% pledge card collections. This does not mean that an employee should be made to give, but it ensures that every employee was asked.

4.

PROMOTE AND PUBLICIZE YOUR CAMPAIGN

Education and information are key to reaching your campaign goals. United Way can help you create an atmosphere of contagious enthusiasm as you educate employees about how their contributions help United Way improve lives in our community. Some successful promotional tools include but are not limited to:

- United Way's Campaign Video. Available on DVD, or accessible online at www.unitedwayvgu.org.
- United Way flyers, posters, and goal thermometers – provided at no cost to your organization.
- Employee testimonials.
- Like us on Facebook and Instagram: @UnitedWayVGU – and share!

- Follow us on Twitter: @UnitedWayUtica – and share!
- Send campaign details via employee newsletters, e-mail, and other in-house communications.
- Special events and activities such as friendly competitions can add fun to your campaign.
- Prizes and incentives can also create interest (idea list pages 28 and 29). If you have a budget, order items online from the United Way Store, visit www.unitedwaystore.com.

Educate Your Employees About Your Local United Way

- United Way’s Campaign Video. Available on DVD, or accessible online at www.unitedwayvgu.org.
- United Way flyers and posters – provided at no cost to your organization.
- Like us on Facebook and Instagram: @UnitedWayVGU – and share!
- Follow us on Twitter: @UnitedWayUtica – and share!
- Send campaign details via employee newsletters, e-mail, and other in-house communications.
- Speakers – Funded program representatives and/or recipients of program services tell stories of how United Way specific programs have impacted their lives.
- Personal testimonies – A funded program has touched most of us. Some of your co-workers may be willing to share their own personal stories.
- Coordinate funded program tour(s) for your team to show the impact of their gift.

5.

IMPLEMENT YOUR CAMPAIGN WITH A “100% ASK”

The number one reason employees don’t give is because they were never asked. It is important to allow every employee to make an educated, personal decision about giving to United Way.

- Start by making your personal gift to United Way. It is easier to ask someone else to give, when you give.
- Personalize each pledge card to help you make sure everyone is asked. You can preserve the confidentiality of the gift by placing the pledge card in an envelope.
- Make sure every employee is provided the opportunity to give. Be sure to include employees who are part time, temporary, travel, or work off-site.

“Ask” with Group Meetings

- The best way to communicate the community’s need and make “The Ask” is by inviting a United Way staff member and funded program representative to speak with your employees during existing staff meetings. If staff meetings do not already exist, consider a special campaign kick-off or smaller meeting to educate employees as a group about United Way.
- Keep the meeting lively, brief, and informative.
- Show the United Way campaign video.
- Encourage questions.
- Thank employees for their participation.

“Ask” with One-On-One Meetings

Some companies individually ask their employees to consider giving to be sensitive to each other person’s personal interest and questions about United Way. United Way has tools to assist you as you develop your talking points.

Both Group Meetings and One-On-One

Hold one group meeting or a series of group meetings and use a one-on-one method as a means of follow-up for those who were not able to attend.

6.

WRAP UP AND REPORT

- Collect all pledge cards. Make sure all pledge cards are signed. Copy and turn in to your payroll department.
- Complete the white report envelope. Enclose cash, checks, and originals of all pledge cards.
- Your United Way staff contact or volunteer will pick up your report envelope, or you can drop it off at United Way's office located at 201 Lafayette Street., Utica. Please call 315-733-4691 ext. 235 to schedule a pick-up or drop-off.
- Report your final results to your fellow employees.

7.

RECOGNITION AND THANK YOU

"Thank you!" Those two simple words not only show appreciation, but also set the tone for year-round communication and next year's campaign. There are many ways to thank your fellow employees, including a personal thank you or a small gift of appreciation. The importance of thanking everyone involved, from those who created a poster, to those who collected pledge cards, cannot be over emphasized. Sponsor a breakfast, luncheon, or build your own sundae bar, to thank employees.

- Thank contributors and non-contributors alike.
- Post thank you posters around your workplace.
- Give a special gift or reception for Campaign Team Leaders and your Campaign Committee. United Way gifts can be found online at the United Way Store: www.unitedwaystore.com.
- Publicize results via employee newsletters, e-mail, and other in-house communications.
- Attend United Way celebration events.



CHECKLIST FOR SUCCESS

PREPARE FOR YOUR CAMPAIGN

- Meet with your United Way representative to evaluate last year's campaign results and strategies and to determine this year's strategies, campaign budget, goal and timetable.
- Meet with your CEO to present campaign strategies, proposed budget, suggested goal and timetable.
- Recruit a campaign committee.



TAKE ACTION

- Solicit incentive items and door prizes (see United Way's suggestions, pages 27–28).
- Consult your payroll department about payroll deduction procedures (if not already in place).
- Develop a CEO kick-off letter (or use United Way's sample letter, page 18).
- Request United Way speakers with 1–2 weeks notice.
- Give your United Way staff member the current number of employees and submit your request for flyers and pledge forms.
- Schedule leadership and employee presentation meetings on company time so all employees can attend.
- Reserve rooms and plan refreshments for meetings.
- Conduct meeting(s).
- Conduct any additional fun-raisers you have planned.

RUN YOUR CAMPAIGN

- Send the CEO letter/email to employees with a campaign endorsement, campaign timeline and schedule of events.
- Kick-off your campaign with a fun event (see United Way's suggestions, pages 27–28).
- Publicize your giving campaign through all your communication channels (email, website, social media, posters, etc.).
- Conduct leadership and employee meetings; collect and tally the pledge forms.
- Follow up with employees who have not turned in their pledge forms.

WRAP UP

- Complete your final report and send all pledge forms to United Way.
- Forward copies of all payroll deduction forms to your payroll department.
- Report the results to your CEO and to employees, thank all employees for their contributions and celebrate the results.
- Publicly congratulate and thank your Campaign Committee for a great job.
- Attend United Way's celebration event. United Way wants to thank you!