

CAMPAIGN COORDINATOR GUIDE



UNITED WAY
St. Charles

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THE ROLE OF CAMPAIGN COORDINATOR

Position Description: Campaign Coordinator

Goal: 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.

Key Responsibilities:

- Attend United Way Campaign Coordinator Training (mid-August).
- Work closely with your CEO, United Way volunteers, and staff member.
- Develop an effective campaign plan including dates, goals, etc.
- Recruit a team of volunteers to assist you.
- Request United Way speakers and coordinate agency tours.
- Request and coordinate distribution of campaign materials.
- Coordinate your company's kick-off and recognition events.
- Promote the campaign throughout your company.
- Encourage leadership giving in your campaign.
- Encourage giving of time, talent, and resources among your co-workers.
- Educate your co-workers about United Way.
- Attend United Way kick-off **Battle for the Paddle** (the first Thursday in October), and invite your co-workers.
- Invite everyone to give and set an example by making a gift yourself.
- Make your company campaign fun!
- Complete your final report and send it with pledge forms to United Way of St. Charles by **December 31**.



STEPS TO A SUCCESSFUL CAMPAIGN

1 Getting Started

- Attend United Way of St. Charles Campaign Coordinator workshop (**mid-August**)
- Know your company's United Way history. Talk to last year's coordinator to find out what worked and what didn't work.

2 Enlist Support

- Secure top-level management support by asking your CEO to commit to one or more of the following:
 - To ensure succession planning, ask your CEO to appoint next year's coordinator to help you.
 - Ask your CEO to encourage donors by providing incentives for giving (incentive ideas on p. 10).
 - Find out if your company has a matching gifts program.
 - Encourage your CEO to speak about the benefits of giving to United Way at your employee group meeting or write a letter of support (sample letter on p. 12).
- Recruit a committee representative from different departments within your organization.
 - Remember the benefits of **TEAM: Together Everyone Accomplishes More**
 - Clearly define the role of your volunteers and how much time they will commit to the campaign.
- A United Way staff member is available to help you whenever you

need assistance. Here are a few ways in which they can help:

- Provide campaign materials, information and support.
 - Make presentations at employee meetings.
 - Arrange for an agency speaker, agency fair or agency tours.
 - Provide campaign history as requested.

3 Decide on a Solicitation Style

- Decide on the best method of approaching fellow employees: group, individual or both.
 - **Group Solicitation:** Employees are brought together to hear the United Way message and then are asked to fill out their pledge cards at the end of the presentation. Group solicitation allows for best use of time, a uniform message and less follow-up.
 - **Individual Solicitation:** This is a one-on-one ask for an employee to make a gift. This style requires more volunteers but personalizes the campaign and gives you the opportunity to answer individual questions.
 - **Both:** Hold one group meeting or series of group meetings and use the one-on-one method as a means of follow-up for those who couldn't attend a group session.

When “the ask” is personal, people are more likely to say yes.

4 Set Clear Goals & Develop a Campaign Plan

- Analyze past campaigns and set realistic goals. Set an increase based on one or more of the following areas:
 - **Percent Participation:** Divide the total number of givers by the total number of employees to get your percent participation. *United Way recommends setting a goal of 100% “ask” instead of 100% participation to give everyone an opportunity to give.*
 - **Dollars Raised:** Consider raising your dollar goal by a percentage over the previous year’s goal. Be sure to include your employer’s corporate gift in the total amount raised.
 - **Average Employee Gift:** Determine your company’s average gift by dividing your total campaign by the number of givers.
 - **Per Capita Gift:** This amount is calculated by dividing the total campaign amount by the total number of employees.

What Makes a Great Committee Member?

- Enthusiasm
- Knowledge of and belief in United Way
- Willing to set an example by giving to United Way
- Well respected by co-workers

Advantages of Group Meetings

- Flexibility:** The group meeting can be adapted to work successfully in any organization’s schedule; a 15-minute United Way presentation can be incorporated into a staff or department meeting.
- Efficiency:** The campaign can be completed in two weeks or less with a minimal amount of production time.
- Effectiveness:** The positive spirit and educational approach of the group meeting encourages greater participation.
- Consistency:** The United Way message is presented in a consistent manner.

5 Promote Your Campaign

- Use United Way brochures, posters, and other campaign materials to build awareness of the upcoming campaign. United Way provides these at no cost to your organization.
- Try placing United Way information in unexpected places, such as on the back of restroom stall doors or in employee pay envelopes.
- Promote and publicize your campaign in employee newsletters, e-mail, and other in-house communication tools
- Increase employee awareness by creating a little friendly competition among departments.
- Prizes and incentives can also create interest.

6 Educate Your Employees About United Way of St. Charles

- **UWSC Website:** Includes agency information and community impact.
- **Campaign Video:** A great addition to your United Way employee meeting is the campaign video. The video is produced locally and highlights people within our community.
- **Speakers:** Recipients of program services can tell personal stories about the impact of United Way on their lives. Agency representatives can talk about the programs they offer.
- **Tours:** Encourage your employees to get a firsthand look at United Way Partner Agencies and the services they provide by participating in an agency tour. UWSC staff can assist with scheduling agency tours.
- **Personal Testimonies:** Whether we realize it or not, most of us have been touched by a United Way agency. Some of your co-workers may be willing to share their stories.

7 Implement a Campaign with a 100% Ask

- Start by making a gift yourself. It is easier to ask someone else to give when you give yourself.
- Personalize each pledge card to ensure everyone is asked. You can maintain the gift's confidentiality by placing the pledge card in an envelope.
- Make sure every employee is given the opportunity to give. Be sure to include employees who are part-time, temporary, retired, traveling, or working off-site.

Remember, the #1 reason people GIVE is because they were ASKED!

8 Report & Celebrate Your Results

- Collect pledge cards. Make sure payroll deduction cards are signed and turned in to your payroll department.
- Summarize campaign information on the Report Envelope. Enclose cash, checks, and copies of pledge cards. Be sure to give details regarding the number of employees and number of givers so that we can recognize your hard work and provide sufficient historical details as needed.
- Call your United Way staff contact to pick up your Report Envelope.
- Report your final results to your fellow employees and thank them for participating. Some ways to say thank you are as follows:
- Hold a thank you event.
 - Send a thank you letter from the CEO.
 - Send personalized thank you notes.
 - Put together goodie bags to thank your committee.

Remember This!

Website Resources

- uwaysc.org
- facebook.com/uwaysc
- unitedwaystore.com
- youtube.com/unitedwayofstcharles
- instagram.com/uwaysc

WHY SHOULD I GIVE TO UNITED WAY OF ST. CHARLES?

United Way of St. Charles works very hard with the support of volunteers to make lasting changes in our community. Your contributions are working year-round to improve the lives of your family, friends, and neighbors.

When you donate to United Way of St. Charles, you can be sure of the following:

- United Way of St. Charles provides oversight and requests reports from our partner agencies to ensure your funds are protected and used as promised.
- United Way of St. Charles also develops and operates programs that target specific needs in St. Charles Parish. We emphasize “proactive” programs designed to help people help themselves. This “teach a man to fish” vision has led us to begin programs like Success By 6, which provides early learning opportunities for children; Imagination Library, which sends any child, age birth to five, a book every month; and Financial Stability Partnership, which provides job/life skills training to adults. These programs would not exist without donations to the United Way of St. Charles.
- United Way of St. Charles works to avoid “duplication of services,” in other words, we try to work with agencies to avoid having several agencies doing the same thing. For example, it’s inefficient to have three agencies providing one service and none providing another important service. The United Way of St. Charles coordinates these efforts.
- 100% of funds raised in St. Charles Parish stays in St. Charles Parish unless a donor requests their gift be sent elsewhere.
- When you make the place you live or work better, you help yourself.

NOTES:



PLEDGE FORM INFORMATION

OPTION

A

United Way of St. Charles Community Investment

For the most efficient and effective use of your donation to target the most pressing community issues, choose United Way of St. Charles Community Investment. Our team of volunteers from both the UWSC Board of Directors and the community uses a multi-step review process to ensure your dollars are used appropriately.

Agencies also provide ongoing reports to UWSC to maintain accountability. All funds stay in St. Charles Parish to support United Way agencies and programs.

OPTION

B

Designate Your Contribution to Another Agency

United Way of St. Charles funds 32 agencies that deliver direct services in St. Charles Parish. You can direct your funds to any one of these agencies or any 501(c)3 organization.

If you live outside of St. Charles Parish, you may designate your contribution to another United Way.*

All designated contributions must be \$100 or more per agency to be honored by United Way of St. Charles.

**Based on your company's pledge system.*

NOTES:



FUN CAMPAIGN IDEAS

Special Events: Special events can add excitement to the campaign. They make a great addition to employee meetings and “the ask.” To be successful, time your events so employees don’t think they take the place of the pledge. The ideas are limitless; here are some suggestions:

- Softball Tournament
- Golf Tournament
- Bake Sale
- Yard Sale
- Executive Dunking Booth
- Silent Auction
- Popcorn and Soft Drink Sale
- Agency Lunch and Learns
- Company Picnic or Cookout
- Ice Cream Social
- Pancake Breakfast
- Carnival
- Office Olympics
- Cutest Baby Contest
- Crazy Legs Contest
- Costume Contest or Party
- Campaign Slogan/Theme Contest
- United Way Trivia Game
- Pumpkin Carving Contest
- Office/Cubicle Decorating Contest
- Chili Cook-Off
- Ugliest Tie Contest
- Dress Down Day
- Employee Cookbook
- Creative Basket Contest and Auction
- Recreate a Television Game Show
- Treasure Hunt
- Car Wash

Incentives: Looking for some incentive ideas you don’t have to purchase?

- Casual Day
- Premium Parking Space
- Time Off with Pay
- Extra Lunch Time
- Leave Early Passes
- Sleep-In Passes
- CEO Car Wash

Other Incentives

- Sporting Event Tickets
- United Way T-Shirts
- Company Logo Items
- Movie Passes
- Dinner for Two
- Hotel Stay Giveaways
- Gift Certificates
- Airline Tickets
- Trophies or Plaques

TOOLS YOU CAN USE

A Sample Campaign Plan: Your key to success is to plan your campaign and make it work for you by designing activities that best suit your organization.



Collaboration

- Meet with upper management
- Recruit committee members
- Talk with a UW representative to set dates and get materials



Goal Setting

- Meet with committee to assess last year's campaign results
- Set a goal to have 100% ASK

Remember This!



Planning

- Decide on which special event to try this year
- Outline the campaign time frame
- Assign responsibilities to committee members



Advertise

- Hang posters
- Send e-mails
- Announce campaign dates at all meetings
- Market the campaign in an unusual way



Campaign

- Run campaign and events
- Hold presentation by inviting CEO and/or UW representative to address employees



Wrap-Up

- Submit final results to United Way
- Celebrate campaign results
- Say thank you to all who participated

Sample 20-Minute Meeting Agenda

- | | |
|--|------------------|
| ○ CEO welcomes employees and endorses campaign. | 2 minutes |
| ○ United Way speaker makes presentation. | 5 minutes |
| ○ Employee gives personal testimony. | 3 minutes |
| ○ Show United Way campaign video. | 5 minutes |
| ○ Campaign Coordinator makes "the ASK." | 3 minutes |
| ○ Campaign Coordinator collects pledge cards; thanks employees | 2 minutes |

SAMPLE LETTERS

Sample Letter #1: Campaign Kick-off Letter from CEO

Dear Employee (personalize with employee name, if possible),

Throughout our personal and working lives, we have learned the value of teamwork. By working together as a team, we can accomplish so much more.

United Way of St. Charles offers a good example of just how powerful a force teamwork can be. Through an extensive network of volunteers and donors, United Way makes sure that a wide range of services are available to the people who live and work in our area. These services include substance abuse counseling and education, job training and placement, assistance for victims of domestic violence, programs for the elderly and our young people and many others.

When you give to United Way of St. Charles, you can be assured that your gift is going directly to the people who need it most, the people who live right here in St. Charles Parish. United Way of St. Charles staff strives to keep the fundraising costs low so that over ninety cents of every dollar raised goes directly to fund the programs that provide critical services within our community.

Once again, I ask that you join with me in supporting our team effort and continue (company name)'s tradition of community support.

Sample Letter #2: Thank You Letter at Campaign's Conclusion

Dear Contributor,

A heartfelt thanks goes to each and every one of you who contributed to this year's United Way campaign. Once again, you have gone the extra mile to make our community a better place for us to live and work.

Many words come to mind describing people like you: generous, concerned, and caring. You realize that when you give to United Way, you help ensure that a wide variety of needs are met, including services to the hungry and homeless, the sick and grieving, our youth and senior citizens, and so many more.

Your generous donation helped us raise a total of **x** for critical health and human service programs funded by United Way of St. Charles. This exceeds last year's results by **x** percent. It's an accomplishment of which you can be proud.

Again, thank you for helping United Way to lend a helping hand to those in need.

FREQUENTLY ASKED QUESTIONS

What is United Way?

United Way of St. Charles is an independent nonprofit organization governed by local volunteers representing the community, bringing people and organizations together. United Way acts as a catalyst for positive change, helping to create and build the resources necessary to improve the quality of life for those who live and work in our area.

How does United Way serve the community?

United Way of St. Charles supports health and human service providers through its strength in raising funds and effectively investing them, through the investment of volunteer resources, and by building community collaborations and partnerships. United Way is the single largest funding stream supporting human services in St. Charles Parish. UWSC's Campaign provides financial support for over 100 programs through 32 affiliated agencies.

What kind of agencies does United Way support?

The agencies supported by United Way provide a variety of critical services to the community, including food and emergency services, childcare and family support, health care services, care for the elderly, assisting people with disabilities, and youth development.

How do agencies receive funding?

After requesting affiliation with United Way, agencies must go through a formal review process. Each agency must submit to an annual independent financial audit and provide services to the community at a reasonable cost. These agencies also submit ongoing reports to United Way of St. Charles to ensure high standards of stability, accountability, and quality service.

I don't use any of the agencies' programs, so why should I give to United Way?

You may have already used the services of a United Way agency and never realized it. One day, we all may need disaster services, youth development services, child or adult day care services, or a variety of other valuable services offered through United Way programs. In addition, everyone benefits from many of the programs, such as those that reduce juvenile crime.



NOTES:

Who is eligible for United Way services?

Services supported by United Way of St. Charles are available to people who live and/or work in the St. Charles Parish community.

Who governs United Way?

Volunteers from the community, both residents and employees of local businesses, govern United Way of St. Charles by serving on its volunteer board of directors and policy-making committees.

Why should I choose to give to United Way?

Through United Way's annual review process, trained volunteers assess community needs and determine how to distribute funds to have the greatest impact. When you contribute to United Way, you know that your gift is reaching those with the greatest need. Your dollars raised in the community stay local and support 32 partner agencies and 100+ programs.

Why should I give if my spouse does?

We hope that you and your spouse both will consider a gift. United Way and our community depend on each working person making a gift based on his or her own income. These gifts are united with others



to make the greatest impact on needs. United Way programs can only continue to provide services if as many people as possible contribute.

How much of my contribution goes directly to service providers?

Making use of a vast network of volunteers and with a strong emphasis on efficiency, United Way strives to keep administrative costs low so that over ninety percent of total dollars received go toward funding programs within our community.

What is the affiliation between United Way of St. Charles and United Way of America?

Each United Way is independent, separately incorporated, and governed by local volunteers. United Way of America provides a variety of services for local organizations and supports their efforts by producing national advertising campaigns. There are more than 1,000 community-based United Ways. While United Way of St. Charles is a member of United Way of America, UWSC's focus is only on St. Charles Parish. All of the money raised in St. Charles Parish stays in St. Charles Parish.

How can I find out more about health and human service agencies in the community?

Call us at (985) 331-9063.

Visit uwaysc.org for more answers to Frequently Asked Questions.

NOTES:





UNITED WAY

St. Charles

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UNITED WAY

St. Charles