

# campaign coordinator's guide

## campaign coordinator checklist

### before the campaign

1. Meet with your United Way Campaign Manager to review prior year's giving and develop a campaign strategy
2. Meet with CEO and union leader (if applicable) to confirm commitment
3. Establish employee campaign goal
4. Determine the type of campaign best suited for your company:
  - E-pledge
  - Peer-to-Peer Solicitation
  - Combination
5. Establish campaign timetable
6. Log onto [www.dayton-unityway.org/tools\\_4\\_companies](http://www.dayton-unityway.org/tools_4_companies) for unique campaign ideas and additional campaign materials
7. Publicize campaign and kick-off
8. Schedule training for solicitors (United Way staff can help)
9. Tour United Way Partner Agencies

### during the campaign

1. Hold a kick-off meeting/party
2. Conduct Leadership campaign with CEO and management team
3. Schedule employee rallies
4. Schedule Partner Agency tours and/or speakers
5. Follow-up with committee members
6. Issue progress reports to your employees and United Way

### after the campaign

1. Compile and report results to your company and United Way Campaign Manager
2. Evaluate results and prepare written recommendations for next year's campaign committee
3. Contact your committee and personally thank them for their assistance
4. Give yourself a big pat on the back for supporting United Way, its network of Partner Agencies and the community

## 20 minute program

2 minutes

*campaign coordinator or company representative*

Welcomes employees and explains the purpose of the campaign and how the company will support the campaign.

2 minutes

*company CEO or labor leader (if applicable)*

Provides statement(s) of support. This establishes a corporate and labor commitment to United Way and encourages company-wide participation.

3 minutes

*campaign coordinator/committee member or United Way Campaign Manager*

Provides an overview of United Way and the impact of its services. This informs the audience of the needs in our community, and offers them the opportunity to participate in addressing those needs.

5 minutes

*employee testimonial or Partner Agency representative*

First-person testimonial showing how employee contributions are making a difference and changing lives in our community.

5 minutes

*campaign video*

Raises the audience's awareness and encourages them to actively support their community by giving through United Way.

3 minutes

*campaign coordinator*

- Ask employees to consider making a contribution
- Explain how pledges can be fulfilled (payroll deduction, cash, check, credit card)
- Describe incentives (optional)
- Tell employees about Leadership giving and Champion's Club and encourage them to join
- Answer questions
- Collect pledge cards or give instructions for returning cards or e-pledging
- Thank attendees, committee and senior management

## campaign awards

### pinnacle award

The Pinnacle Award is the highest honor presented to organizations that best exemplify the vision of United Way through their spirit, involvement and leadership throughout the year.

### upward momentum award

All companies that achieve a double-digit increase in their employee campaign and/or corporate gift will be recognized with the Upward Momentum award.

### a company that cares award

All companies that support our community through a United Way employee campaign and/or corporate gift will be recognized with A Company that Cares award.

### 10-second United Way message

United Way engages the community to support a local network of health and human service agencies and initiatives that make lasting changes in the Miami Valley.

### 60-second United Way message

Our local United Way supports a network of health and human services provided by more than 80 Partner Agencies right here in the Greater Dayton Area. United Way actively engages the community in initiatives to create lasting changes – such as preparing youth to succeed in school today and in the jobs of tomorrow or preventing home foreclosure and homelessness. By making a contribution, you make an investment in your community. United Way focuses on underlying causes to get to the heart of local problems and to prevent them from happening in the first place. Your help is needed because, together, we can get results no one can accomplish alone.

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United Way of the  
Greater Dayton Area

# welcome

Welcome to the United Way team and congratulations on being appointed Campaign Coordinator for your organization's 2006 Campaign. You are joining a select group of volunteers from across Montgomery, Greene and Preble Counties, who are working together to meet this year's community fundraising goal. These funds will provide vital services to those who are most in need in our local neighborhoods.

As you work on this year's campaign, please remember that United Way of the Greater Dayton Area is a local nonprofit charity working to engage the community in order to support a local network of health and human service agencies and initiatives that make lasting changes in the Miami Valley.

A volunteer Board of Directors governs United Way and is responsible for all policy decisions. Volunteer funding teams review programs and allocate donations to Partner Agencies, who achieve proven results. These local volunteers represent all segments of our community.

Your success during this process is the community's success. Please know that you are a valued member of the United Way team. If you need assistance, call your United Way Campaign Manager. All letters, logos, graphics and collateral materials can be downloaded from the online toolkit:

[www.dayton-unityedway.org/tools\\_4\\_companies](http://www.dayton-unityedway.org/tools_4_companies)

The needs are greater than ever. Please help relay this sense of urgency in your workplace campaign.

Thank you.

## award-winning campaigns include these best practices

- Campaign goal of a double-digit increase
- CEO-endorsed separate Leadership Campaign
- Kick-off meetings with Partner Agency speakers
- Partner Agency tours
- Incentives
- Champion's Club (1% of annual gross pay)
- Year-round United Way communication to staff
- New Hires program
- Volunteering for your United Way
- Community Care Day participation (First Friday in June)

## community matters

- Your United Way contribution is an investment in your community.
- United Way is your local source to give or get help.
- Sometimes leading, sometimes supporting, United Way works to create lasting changes in people's lives and the community.
- United Way is engaging the community in initiatives to make lasting changes.
- Together, we achieve results that no one can accomplish alone.

## results matter

- Your local United Way supports a network of services, provided by more than 80 local Partner Agencies.
- United Way makes sure your money is well spent to meet local needs.
- United Way is accountable and gets results.
- United Way focuses on the underlying causes to get to the heart of local problems.
- United Way's goal is long lasting change that prevents problems from happening in the first place.

## priority areas

- Children, Youth and Families: Strengthening families and helping children and youth succeed.
- Positive Living for Vulnerable Populations: Helping the elderly and people living with a disability live independently.
- Community Capacity: Building the capacity of the nonprofit network to meet the growing needs of today and solve the problems of tomorrow.

# 4 steps to success

## 1. establish leadership

Involve your CEO and union representative (if applicable). Their support and enthusiasm can be contagious. Ask them to personally solicit senior management/union leaders in advance of the company-wide kick-off. Their leadership sets an example for other contributors. Encourage them to endorse the campaign in a letter to all employees.

form a campaign committee

Don't try to do it all alone! Recruit a campaign committee. Include management as well as hourly and union employees. Include people with special talents who are committed to United Way.

## 2. set a challenging goal... and develop your strategy

- Include a Leadership Giving Campaign
- Create a plan to increase participation
- Create a plan to increase pledge amounts
- Offer incentives
- Check if your company will be giving a corporate gift
- Plan promotions and publicity utilizing e-mail, bulletin boards, newsletters, payroll stuffers and memos as forums for your campaign message. Your United Way Campaign Manager can provide you with ideas and materials such as brochures, posters and thermometers, as well as agency tours and speakers. You can also download additional materials from:  
[www.dayton-unityedway.org/tools\\_4\\_companies](http://www.dayton-unityedway.org/tools_4_companies)
- Plan a kick-off (time and place) and/or other events
- Schedule group meetings - include the campaign video, a United Way speaker and/or Partner Agency representative
- Schedule United Way Partner Agency tours

## 3. make the ask

group solicitation

A successful way to ask employees to contribute is through group solicitation. Bring employees together to view the campaign video, hear a speaker, receive United Way literature and have fun.

e-campaign

E-pledge campaigns allow employees to pledge electronically, at work or from home. E-pledging is easy, secure, efficient and saves your company a lot of time processing pledges. Many companies using e-pledge have seen an increase in the average giving and participation rates.

peer-to-peer solicitation

For a more personal approach, have designated employees ask a colleague to contribute. Peer-to-peer solicitation often results in greater participation rates.

- Recruit one solicitor for every 10 employees
- Recruit solicitors who are committed to United Way
- Train recruits with the help of United Way staff
- Follow up with absentees, part-time employees and new hires throughout the year

## 4. thank contributors & report results

- Relay final results to the entire company
- You, your campaign committee and fellow employees made it happen, give everyone credit for coming through!
- Have a reception for all contributors with the CEO and labor leader (if applicable) offering personal thanks
- A personal handshake and warm "thank you" sends a powerful message
- Blanket bulletin boards, newsletters, e-mail accounts and your intranet with "thank you" messages
- Don't forget your committee members and solicitors; plan a special event to thank them for their time and support
- Complete the 2006 Campaign Report Form - contact your United Way Campaign Manager to arrange a time for results to be picked up
- Provide United Way with names of Champion's Club (1% of annual gross pay) members and Leadership Circle members

what matters.®

Help close the gap...  
The more dollars we raise, the  
more people we can help.