

# Fox Valley United Way Campaign Coordinator Resource Guide



**Fox Valley United Way**

**LIVE UNITED™**

### Coordinators Matter

Congratulations – and Thank You – for becoming a Fox Valley United Way Employee Campaign Coordinator!

Being a Coordinator means spending time distributing materials, organizing events, and spreading the United Way message. As you utilize many resources to conduct your campaign, we hope you will also experience some direct benefits:

- Become more connected to the people in your company.
- Strengthen relationships with your co-workers.
- Demonstrate your leadership skills.
- Network with others in the community through United Way training and events.
- Have some fun!

Whether this is your first time as a Coordinator or you have coordinated your campaign multiple times, this handbook will help you get the most out of your campaign. Just follow the steps for conducting a successful campaign, and you are guaranteed to have a great campaign.

Being an Employee Campaign Coordinator is crucial to the success of United Way. Without you, we could not fund the programs that provide needed services in our community. When you reach out a hand to one, you influence the condition of all. That's what it means to LIVE UNITED.

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## What does an Employee Campaign Coordinator do?

Position Description: Employee Campaign Coordinator (ECC)

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:

- Work closely with your CEO, and United Way staff member.
- Develop an effective campaign plan including dates, goals, etc.
- Recruit a team of volunteers or committee members to assist you.
- Request speakers and materials from United Way.
- Coordinate the distribution and collection 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.
- Make your company campaign fun!
- Complete your Report Envelope and send it with pledge forms to United Way.
- Thank your donors and volunteers.
- Evaluate and make recommendations for next year.
- Visit United Way's website at [www.uwfoxvalley.org](http://www.uwfoxvalley.org)

## Steps to a Successful Campaign

### 1. Getting Started

Know your organization's United Way history. Talk to last year's coordinator and 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 insure 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 page 12).
- 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 meetings or write a letter of support (sample letter on page 15.)

Recruit a committee representative of different departments in 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.

Arrange for support and materials from United Way. A United Way Representative is available to help you. Here are a few ways a United Way staff can help:

- Provide campaign materials, information and support.
- Make presentations in your employee meetings.
- Arrange for a member organization speaker

#### 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**

### 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 a 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.

### 4. Set Clear Goals and 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% solicitation 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 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 total number of employees.

## 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 fosters a greater spirit of giving in a greater number of people.

### **Consistency:**

The United Way message is presented in a consistent manner to the workforce.

### 5. Promote Your Campaign

Use United Way brochures, posters, pins, pens; give away items, and thermometers 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. If you have a budget, you can order items from the United Way catalog. (See page 12 for a list of free incentive ideas.)

### 6. Educate Your Employees about Your Local United Way

**Campaign Videos and DVDs:** A great addition to your United Way employee meetings.

**Speakers:** United Way staff members, as well as member organization representatives can tell you about the programs their organizations offer that are funded by United Way.

**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 own personal stories.

Contact United Way to arrange for use of a Video, DVD or Speaker.

### 7. Implement the 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 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 given the opportunity to give. Be sure to include employees who are part time, temporary, travel or work off-site.

## 8. Report and Celebrate Your Results

Collect all pledge cards. Make sure all payroll deduction cards are signed and turned in to your payroll department.

Summarize all campaign information on the Report Envelope. Enclose cash, checks, and copies of all pledge cards. Be sure we have enough information to recognize your employees for Leadership Giving.

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 for employees
- Send a thank you letter from the CEO
- Send personalized thank you notes
- Put together goodie bags to thank your committee

## Why United Way

United Way makes a difference in our community. Your contributions are working year round improving the lives of your family, friends, and neighbors.

United Way is effective because it is . . .

### **Local**

Your donation works right here in our own community. United Way is the best way to help the most people in Southern Kane and Kendall County.

### **Efficient**

Thanks to the dedication and commitment of many community volunteers and a small staff, United Way is able to maintain a low overhead. United Way is the most efficient way to help the most people.

### **Accountable**

Trained volunteers review agency programs and budgets. United Way makes sure your gift supports programs that have proven they meet the need and change lives. United Way is the smartest way to help the most people.

### **Expert**

United Way continuously evaluates our community's diverse needs and directs funds to those areas that have the most positive impact in our community, thus making United Way an expert in helping the most people.

## Strategies to Grow Your Campaign

### Loyal Contributors

The Fox Valley United Way wants to recognize our Loyal Contributors and encourages you to do the same at your organization. A Loyal Contributor is someone who has donated in any amount to the United Way (any United Way) for ten years or more. This is new to us and we are working on ways to recognize these individuals. At your organization you could hold a special reception, breakfast or luncheon for these special individuals. Or hold a special drawing for these individuals. There is a check box on this year's pledge form that any Loyal Contributor interested in being recognized and receiving information on United Way should check. Please be sure to mention this in your campaign presentations

### Leadership Giving

The Fox Valley United Way wants to recognize individuals and families whose combined giving achieves giving levels of \$1,000.00 or more. A family's giving is recognized at the appropriate level regardless of the amount from one family member or another. *To ensure proper recognition, please remind your coworkers to read and fill out the **Leadership Recognition** section of the pledge form.*

- If possible, determine who to target for your leadership giving campaign by salary range, management level, or donors who are already close to that level of giving.
- Ask the CEO about hosting a breakfast, reception, or other meeting to kick off your leadership campaign prior to your employee campaign.
- Send personal invitations from your CEO to the potential leadership givers. Use the sample agenda on page 14. Be sure to include the following:
  - CEO explains leadership giving and gives personal endorsement.
  - CEO explains matching gifts program if your company has one.
  - CEO asks employees to consider giving at a leadership level.
  - Break it down into a palatable amount; for example, "you can be a leadership giver for just \$1.37 a day—the cost of a cup of coffee or a soft drink." Spouses may combine gifts for recognition. (Be sure they complete section on pledge form.)
  - Follow-up with those who were unable to attend your meeting.
  - Report all results with appropriate documentation for recognition and say thank you.

### Strategies to Increase Giving

Increasing Participation	Increasing the Average Gift
Hold an “early bird” drawing for everyone who turns in a pledge form by the end of each employee meeting	Give employees time off for giving at a certain level. For example, a day off for one hour’s pay per month.
Hold a drawing at the end of the campaign for everyone who participated.	Stress the ease of giving through payroll deduction.
If you make your goal, have a party.	Hold a leadership giving campaign.
Give everyone the opportunity to hear about United Way and an opportunity to give.	Ask employees to give up one soft drink per week and increase their gift by that amount.
Use an incentive such as Dress Casual Days to encourage first time givers.	

## Fun Campaign Ideas

### Special Events

Special Events can add fun and excitement to the campaign. They make a great addition to the employee meetings and the Ask. To be successful, be sure to time your events so that employees don't think they take the place of the pledge. The ideas are limitless. Here are some to get your creative juices flowing:

- |                              |                                    |
|------------------------------|------------------------------------|
| Softball Tournament          | Costume Contest or Party           |
| Golf or Putt-Putt Tournament | Campaign Slogan/Theme Contest      |
| Bake Sale                    | United Way Games (Trivia, etc.)    |
| Yard Sale                    | Pumpkin Carving Contest            |
| Executive Dunking Booth      | Cubicle Decorating Contest         |
| Silent Auction               | Chili Cook-off                     |
| Sell popcorn and soft drinks | Ugliest Tie or Earring Contest     |
| Agency Lunch and Learn       | Dress-up Day                       |
| Company Picnic or Cookout    | Employee Cookbook                  |
| Ice Cream Social             | Creative basket contest & auction  |
| Pancake Breakfast            | Recreate a television game show    |
| Carnival                     | Office or United Way Treasure Hunt |
| Office Olympics              | Car Wash                           |
| Cutest Baby Picture Contest  | Flower Sales                       |
| Crazy Legs Contest           | Talent Show                        |
| Guitar Hero Contest          | Karaoke Contest                    |

### Incentives

Looking for some incentive ideas that you don't have to purchase?

- Casual Day
- Premium parking space
- Time off with pay
- Extra lunch time
- Leave early passes
- Sleep in passes
- Drawing for CEO Car Wash
- Sporting Event Tickets
- Frequent Flyer Miles (can be used to purchase airline tickets)

### Themes

Put more enthusiasm into planning your campaign by centering everything around a theme:

- American Idol or Star Search
- Mardi Gras
- Camp United Way
- A decade theme (1960's etc.)
- Sports (Football, NASCAR, etc.)
- Olympics
- Oktoberfest
- Survivor or Island theme
- LIVE UNITED

## A Sample Campaign Plan

Your key to success is to plan your campaign and make your plan work for you by planning activities that best suit your organization.

<p><b>Week 1—Collaboration</b></p> <ul style="list-style-type: none"> <li>○ Meet with upper management.</li> <li>○ Recruit Committee Members</li> <li>○ Talk with account representative to set dates and get materials</li> </ul>	<p><b>Week 2—Goal Setting</b></p> <ul style="list-style-type: none"> <li>○ Meet with committee to assess last year's campaign results</li> <li>○ Set goals based on desired outcomes. (See United Way Award form to choose a level)</li> </ul>	<p><b>Week 3—Planning</b></p> <ul style="list-style-type: none"> <li>○ Decide on which special events to try this year</li> <li>○ Outline the campaign time frame (two weeks is recommended)</li> <li>○ Assign responsibilities to committee members</li> </ul>
<p><b>Week 4—Advertise</b></p> <ul style="list-style-type: none"> <li>○ Hang posters</li> <li>○ Send e-mails</li> <li>○ Announce campaign dates at all meetings</li> <li>○ Market the campaign in an unusual way</li> </ul>	<p><b>Week 5—Campaign</b></p> <ul style="list-style-type: none"> <li>○ Run campaign and events</li> <li>○ Hold presentation by inviting CEO and/or account representative to address employees</li> </ul>	<p><b>Week 6—Wrap-up</b></p> <ul style="list-style-type: none"> <li>○ Submit final results to United Way</li> <li>○ Celebrate campaign results</li> <li>○ Say thank you to all who participated</li> </ul>

## Sample Meeting Agenda

♦ CEO welcomes employees, endorses campaign and introduces United Way	2 minutes
♦ United Way representative, video & member organization give presentation	12 minutes
♦ Employee Campaign Coordinator goes over pledge form, discusses incentives and any other information pertinent to internal campaign, makes the ASK and thanks everyone for attending	6 minutes
<b>TOTAL TIME</b>	<b>20 minutes</b>

## Tools You Can Use

### Sample Letters

#### Sample Letter No.1: Campaign Kick-off letter from Chief Executive Officer

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.

The Fox Valley United Way 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. Locally, our United Way has a dual strategy to address issues in our community by aligning program services to meet community goals by providing needed programs and services to individuals and families within our community.

When you give to The Fox Valley United Way, you can be assured that your gift is going directly to the people who need it most.

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

Sincerely yours,

#### Sample Letter No. 2: Thank you letter at campaign's conclusion

Dear Contributor,

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 to describe 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 \$\_\_\_\_\_ for programs and services including food, shelter, healthcare, and countless programs and services funded by The Fox Valley United Way. This exceeds last year's results by \_\_\_\_\_ 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

**Q: What is United Way?**

**A:** United Way mobilizes resources to meet community needs. United Way raises funds during an annual community campaign from businesses, employee groups and individuals. Funds raised are invested in local programs to improve lives and build a strong community. United Way is unique in its volunteer review of program services, in which local volunteers make annual funding recommendations. Each United Way is local and independent, choosing its funding criteria and priorities to fit the local community. Local United Ways come together through their affiliation with the national trade organization, United Way of America (UWA).

**Q: How much of my contribution goes directly to funding services?**

**A:** 80% of all contributions to United Way goes directly to programs providing services in Southern Kane and Kendall County. Some of United Way's fund raising and administrative expenses are underwritten by Corporate Sponsors.

**Q: What is the Community Action Fund?**

**A:** Dedicated volunteers evaluate local programs from United Way Member Organizations and make sure United Way funding is making the greatest impact possible. You don't have to decide between helping children, seniors or individuals needing a warm meal and a place to stay. United Way's Community Action Fund improves our community by wrapping services around families and individuals by funding programs addressing all these issues. United Way's Community Action Fund takes a proactive approach to supporting education, family and individual development and supports services for those who are in need.

**Q: How are Community Fund funding decisions made and by whom?**

**A:** All programs are reviewed and evaluated by local citizens serving as volunteers on our Allocations Committee. The committee considers each agency's program application against variables that include – the administration of the program or service, its goals and effectiveness, and the need in our community. The committee then makes appropriate program and funding recommendations to the United Way Board of Directors. The United Way Board of Directors has the final authority to determine program funding.

**Q: Why does United Way have paid staff?**

**A:** No organization as big as this United Way, in terms of the money for which it is responsible and the number of volunteers involved can operate efficiently without qualified staff support. United Way's three staff members manage the day-to-day operations and provide support to approximately 56 health and human service agencies.

**Q: How do agencies join United Way?**

**A:** Any non-profit health and human service agency may apply to join the United Way. Agencies interested in applying must meet the following criteria:

- Agency must be chartered as a not for profit corporation in the State of Illinois
- Agency must be registered as an organization established as a charitable organization with the Attorney General of the State of Illinois.
- Agency must be established as a Section 501 ( c ) ( 3 ) under the IRS for two years.
- Agency must have a Federal Employee ID Number (FEIN)
- Agencies must also follow the guidelines and policies of the Fox Valley United Way.

**Q: Can I split my gift?**

**A:** Yes, you can split your gift between the Community Action Fund, targeted areas of Education, Income, and Health and any other United Way Member Agency.

**Q: Can I direct my gift to a specific agency?**

**A:** Yes. While United Way's primary focus is the Community Action Fund, donors may direct all or a portion of their contribution to any United Way Member Agency.

**Q: Can my gift be directed to a United Way in a different community?**

**A:** Yes. Contributions may be directed to United Ways in other communities.

**Q: Why are Employee Campaigns important?**

**A:** 2/3 of all United Way support comes from individuals giving through employee campaigns or direct gifts. Your gift, no matter what size, makes an impact on services in our community when it's combined with the contributions of others.

Of the funds available for services, 67% comes from individual giving either through workplace giving campaigns or direct personal donations. Corporate and small business donations comprise the remaining 33% of the funds available for services.