



Coordinators Matter

Congratulations – and Thank You – for becoming a 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 (ECC) is crucial to the success of United Way. Without you, we could not fund the programs that provide needed services in our community. When we reach out a hand to one we influence the condition of all.

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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:

- Attend United Way Coordinator training.
- Work closely with your CEO, United Way volunteer and staff member.
- Develop an effective campaign plan including dates, goals, etc.
- Recruit a team of volunteers to assist you.
- Request speakers and tours 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.
- Attend United Way kick-off event. Invite your co-workers.
- Invite everyone to give. 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.
- Thank your donors and volunteers.
- Evaluate and make recommendations for next year.

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 11).
 - 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 13.)
- 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 volunteer or staff member is available to help you. Here are a few ways a Campaign Cabinet member, a Loaned Associate (LA) , or United Way staff can help:
 - Provide campaign materials, information and support.
 - Make presentations in your employee meetings.
 - Arrange for an agency speaker, agency fair, or agency tours.
 - Plan and implement your campaign.

3. Decide on Your Solicitation Style

- Decide on the best methods 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.

Electronic: Send out reminder emails, or share the success stories of Snapshots of Success.

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.

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.

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.

5. Promote Your Campaign

- Use United Way brochures, posters, 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 11 for a list of free incentive ideas.)
- Host the Snapshot of Success, a traveling photo exhibit that displays United Way donors and program recipients.

6. Educate Your Employees about Your Local United Way

Campaign DVDs: A great addition to your United Way employee meetings. Videos have been produced locally and highlight supporters and people who have been helped right here in our own community.

Speakers: Community Partners representatives can tell you about the programs their organizations offer. Campaign Volunteers and United Way staff are also available.

Tours: Encourage your employees to get a first hand look at the Community Partner and the services they provide by participating in a tour.

Personal Testimonies: Whether we realize it or not, most of us have been touched by a United Way. Some of your co-workers may be willing to share their own personal stories.

Host the Snapshots of Success, a traveling photo exhibit that features United Way donors and program recipients.

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

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 Landmark-Leadership Giving (\$500 and up) and Care Share giving.
- Call your Campaign Volunteer or United Way 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 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 our area.

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 Community Partner 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.

Our Mission, Vision and Value Statements

Mission Statement

We unite people and resources to build a stronger community.

Vision Statement

We will be champions of our community, empowering individuals and improving lives, while striving for IDEALS that facilitate lasting, positive change.

Value Statements

Integrity ~ We practice care, compassion and honesty in the stewardship of resources and relationships entrusted to us by our community.

Diversity ~ We value each person's unique gifts that strengthen our community through individual experiences, skills and resources.

Excellence ~ We focus on achieving the highest standards of organizational excellence and are committed to achieving our mission and vision.

Accountability ~ We ensure effective, responsible, equitable and ethical management of the resources given to us by our community.

Leadership ~ We present a strong, united voice that inspires people to build a better, more self-sufficient community.

Solutions ~ We work collaboratively, effectively and strategically to improve pressing local health and human service needs, while creating a caring and responsive community.

Strategies to Grow Your Campaign

Leadership Giving

United Way recognizes donors who contribute \$500 or more on an annual basis in our Annual Report. Landmark- Leadership Foundation:

- The Alexis de Tocqueville Society [\$10,000 +]
- The Nashcombe Circle [\$5,000 and \$9,999]
- The Tar River Circle [\$2,500 - \$4,999]
- The Coastal Plains Circle [\$1,000 - \$2,499]
- The Gateway Circle [\$500 - \$999]

- ❖ Ask someone to serve as the landmark- leadership giving chair. He or she should participate at that level.
- ❖ Determine whom 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 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 10. 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.”
- ❖ Follow-up with those who were unable to attend your meeting.
- ❖ Report all results with appropriate documentation for recognition and say thank you (thank you ideas on page 7).

Increasing Participation	Increasing the Average Gift
Hold an “early bird” drawing for everyone who turns in a pledge card 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 landmark-leadership informational session.
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.	Use the “What One Can Do” information to grow your campaign.

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

Incentives

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

- | | |
|-----------------------|--------------------------|
| Casual Day | Sleep in passes |
| Premium parking space | Drawing for CEO Car Wash |
| Time off with pay | |
| Extra lunch time | |
| Leave early passes | |

Themes

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

- LIVE UNITED
- American Idol
- Mardi Gras
- Camp United Way
- A decade theme (1960's etc.)
- Sports (Football, NASCAR, etc.)
- Olympics
- Octoberfest
- Survivor or Island theme
- Tools You Can Use

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

Sample Meeting Agenda

- ◆ CEO welcomes employees and endorses campaign. 2 minutes
- ◆ United Way speaker makes presentation. 5 minutes
- ◆ Employee gives a personal testimony. 2 minutes
- ◆ Show United Way video. 6 minutes
- ◆ Employee Campaign Coordinator makes the ASK. 3 minutes
- ◆ Employee Campaign Coordinator collects pledge cards and thanks employees. 2 minutes

20 minutes

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.

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. These services include substance abuse counseling and education, assistance for victims of domestic violence, programs for the elderly and our young people and many others. When you give to 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, our youth and senior citizens, and so many more.

Your generous donation helped us raise a total of \$ _____ for critical health and human service programs funded by 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: Each United Way 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.

Q: How does United Way serve the community?

A: United Way 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 collaborative and partnerships. United Way is the single largest funding stream supporting human services in our area. United Way also collaborates with other non-profits, and organizations to build a stronger community. We also house a volunteer and field over 1,000 calls for assistance each year.

Our NC 2-1-1 resource database allows the public to find services such as food, housing, health care, volunteer opportunities, etc. This 24-hour-a-day system is free and confidential. Get connected to a referral specialist by simply dialing 2-1-1. Resources can also be accessed via the Internet at www.nc211.org.

A United Way collaboration called G.R.A.S.P.P. (Gang Resistance, Awareness and Prevention Program) is a multi-level youth violence awareness and prevention program that addresses the impact of youth violence and gang culture within families, schools and the broader community. In partnership with the Nash County's Sheriff's Office and the City of Rocky Mount Police Department, G.R.A.S.P.P. offers comprehensive specialized programs designed to decrease the negative impact of youth violence on individuals, schools and communities at large. More information on G.R.A.S.P.P can be accessed via the Internet at www.grasppforpeace.org.

Q: What kind of Community Partners' does United Way support?

A: The Community Partners supported by United Way provide a variety of critical services to the community, including food, shelter and emergency services, care for the elderly, assisting people with disabilities and youth development, just to name a few.

Q: I don't use any of the Community Partners' programs, so why should I give through United Way?

A: You may have already used the services of a United Way Community Partner 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. Strengthening our community helps everyone.

Q: Who is eligible for United Way services?

A: Services supported by United Way are available to people who live and/or work in our area.

Q: Who governs United Way?

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

Q: Why should I choose to give through United Way?

A: Through United Way's annual citizen-review process, trained volunteers assess community needs and determine how to distribute funds to have the greatest impact. When you contribute to United Way's Community Fund, you know that your gift is reaching those with the greatest need. Your dollars raised in the community stay in the local community and help support 21 Community Partners and 41 programs.

Q: Why should I consider using payroll deduction for my contribution?

A: Payroll deduction is an easy and affordable way to give, allowing you to contribute a small amount of your paycheck over a longer period of time. And, if your company has a matching gifts program, you can automatically double the amount of money being pledged to help those in need. This efficient system also allows more of your contribution to go directly to service providers by helping to keep administrative costs low.

Q: Can I specify where I want my contribution to go?

A: United Way strongly recommends that you invest your gift in the Community Fund, where your dollars will have the greatest impact on addressing the community's most critical needs. You may still choose to designate to a specific agency or county.

Q: What is the United Way's policy against pressuring employees to give?

A: Giving is a personal matter and decision; whether people give and how much they choose to give is up to the individual. The purpose of United Way is to offer people an opportunity to give so that others may receive the help they need. We hope you will give because you are able to and because you feel good about helping others. Your giving should be personal and "from the heart."

Q: How much should I give?

A: Only you can decide how much you can give. United Way also offers several giving and recognition opportunities to our donors.

Q: What is the affiliation between our local United Way and United Way Worldwide (formerly United Way of America)?

A: Each United Way is independent, separately incorporated and governed by local volunteers. United Way Worldwide provides a variety of services for local organizations and supports their efforts by producing national advertising campaigns. Nationwide, United Way supports approximately 47,000 agencies, helping millions of people from all walks of life. United Ways have been leading the cause of caring for more than 100 years. There are approximately 1,400 community-based United Ways. In addition, United Ways mobilize more than a million volunteers annually in communities nationwide.

United Way ensures that each organization in which they invest is a non-profit, tax-exempt charity governed by volunteers, and that it submits an annual, independent financial audit and provides free services at a reasonable cost.

United Way Worldwide is the national organization dedicated to leading the United Way movement in making measurable impact in every community across America. It invests in the programs and services that strengthen the ability of local United Ways to identify and build a coalition around a set of community priorities and measure success based on community impact.

Q: How can United Way afford advertising?

A: National and local commercials, including the NFL advertising provided through United Way Worldwide, are provided at little or no cost to United Way. Newspaper, electronic media and corporate advertisers are great supporters of United Way, donating or reducing cost for time and space for these promotions as just one facet of their support. In addition to these, many companies make "in-kind" donations to offset the cost of time or materials.

Q: I'm new to the area and would like to help others by volunteering. How can I find a volunteer opportunity that fits in with my hectic schedule?

A: United Way connects individuals wishing to volunteer with a variety of volunteering activities. If you are interested in helping with a one-time project or serving long term, we can help find the right opportunity for you. To learn more, please call (252) 937-2213 or visit www.nc211.org.

**NEED HELP?
WANT TO HELP?**

JUST DIAL



Free and Confidential Access to Local Health and Human Services

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Please leave a lasting legacy
and remember United Way in your estate plan.