

LIVE UNITED™

Campaign Coordinator Manual



United Way of the
Greater Clarksville Region

YOUR ROLE IN THE CAMPAIGN

The key to running a successful company campaign is you! Here are a few tips to help you along the way:

- Provide leadership and direction for your fellow coworkers.
- Motivate Them!
- Ensure that all employees are given the opportunity to contribute.
- A contribution directly affects their family, friends, neighbors, coworkers and our community.

To make your role easier, your United Way has provided all the information that you need to assist you during your campaign. The United Way staff, Team Captains and other volunteers are on call to provide personal assistance, help plan special events or initiatives and provide United Way and/or agency speakers for your meetings.

Be sure to visit liveunitedclarksville.org, liveunitedhouston.org or liveunitedstewart.org and check out the Community Campaign under the “Advocate” tab to find all of the campaign materials electronically, as well as fun tools - such as a United Way screen saver and desktop video.

“We make a living by what we do, but we make a life by what we give.”
-Winston Churchill

REACHING NEW HEIGHTS

Follow these proven strategies for a successful campaign.

STEP 1: Get your CEO/Boss involved

Your CEO and top management’s support and involvement demonstrates more effectively the importance of your company’s commitment to our community.

Keep your CEO and top management informed and involved by asking them to:

- Send a letter to each employee encouraging them to participate in your company’s United Way Campaign

STEP 2: Recruit a winning team

Don’t try to do it all by yourself. Get a team together. It’ll make the job easier and a lot more fun!

- Recruit members from each department and include a union representative if you have one.
- Plan your campaign with your team using the worksheet provided

STEP 3: Set a Challenging Goal and a firm timetable

- Work to meet that goal within an established time to give all a sense of accomplishment and pride

Step 4: Promote the Campaign

- Plan campaign activities and themes
- Plan a campaign kickoff event
- Distribute CEO (and Union, if applicable) endorsement letters
- Display posters, thermometers, and other materials
- Use e-mail and other media to communicate before, during, and after the campaign

Step 5: Conduct your Company Campaign

- Schedule group meetings for all employees OR conduct one-on-one solicitations

Step 6: Report your Results

- Keep coworkers informed about campaign status in relation to the company’s campaign goal
- When you have completed your campaign, turn in your packet to United Way

Step 7: Say Thank You!



THINK OUTSIDE THE BOX!

Encourage your coworkers to help you think outside the box. The more hands helping, the more creative the idea!

Giving employees advance notice that the campaign will be starting helps them get prepared to make their financial contribution. And, it gives you an opportunity to make it fun and increase interest. Your United Way Campaign offers a great opportunity to plan some special team-building activities within departments, or for the whole company. Here are some ideas other companies have used that you may want to try - be creative!

Incentives

Use incentives to encourage employees to get involved. Offer incentives more than once a year.

For example:

- Parking spaces near the entrance - or even better - the Boss's!
- A "fair share" day off for employees giving their fair share
- Drawing for a special gift
- A two-hour lunch break
- Gift certificate for a shopping spree

Themes

Develop a theme for your campaign and be creative in planning flyers and events around it. For example, think about what you could do with:

Time period themes (celebrate the nostalgic 40's, 50's, 60's, etc.)

Sports
Music
Movies



Promoting your Campaign

Inform employees of campaign dates and provide them with plenty of information using the following resources:

- Group Presentations
- Letter from your CEO
- Posters
- Flyers
- E-mail
- Speakers and tours program
- Employee testimonials
- Company Newsletter articles/ads
- Goal posters
- Lunchroom Table Tents
- Payroll inserts
- Screen savers

Events and Activities

- Recreational - a golf outing, softball or volleyball game or tournament, or a picnic
- Stage an employee talent show
- An ice cream social for your employees - invite children from a United Way agency
- Hold a staff meeting at a United Way agency and take a tour
- Raffle off your Boss - winner trades places with their boss for a few hours - or a day
- Good Neighbor Bar be que - plan a "field day" featuring games with neighboring companies
- Invite multiple United Way Partner Agencies to visit your company or organization to provide more information to your fellow co-workers.

Competitions and Contests

- Company history and facts contest
- United Way poster contest for the employees' children
- Have a cook-off
- Guess the identity of employees by their high school or baby pictures



TIPS TO CONSIDER AS YOU START

- Schedule a short, intensive campaign. Short campaigns keep the momentum and enthusiasm high while helping keep the time and work effort more manageable for you.
- Recruit a team of enthusiastic fellow-employees to help you conduct the campaign – it will make it easier and more enjoyable for you, and get more people involved
- Pledge to give yourself – it is easier to ask others to give when you are giving
- Strive for 100% ask – that every employee is personally asked to consider their gift to the United Way
- Remember, giving is a personal decision. Even if you are striving for 100% participation, no one should ever feel forced to give

GROUP MEETING

To get your campaign off to strong start, consider a kick-off event or group meeting. Include all employees (full and part-time), the CEO, company president, or other top management person, a United Way representative and/or agency speaker or an employee with a personal story to tell about how they benefitted from a United Way funded service. This is a good time to show the United Way campaign video.

Set an agenda before the meeting to help utilize this time most effectively. The sample on the following page may help you organize this. While a 30 minute meeting time is suggested, an effective and interesting group meeting can be conducted in as little as 15 minutes.



Sample Kick-off or Group Meeting Agenda

- | | |
|--|-----------|
| (1) CEO - welcomes and thanks employees for their participation in 2008: | 2 minutes |
| (2) Campaign Coordinator - brief overview of campaign: | 3 minutes |
| (3) Testimonial - (a) from employee who has benefitted from a United Way funded service; or (b) a representative of United Way and/or a representative or client of a United Way agency: | 5 minutes |
| (4) United Way | |
| (a) Campaign video | 3 minutes |
| (b) Staff or volunteer - making the case for giving to United Way: | 5 minutes |
| (5) Campaign Coordinator - discuss 2008-2009 Company Campaign goal, schedule, planned activities, events, contests, incentives, etc: | 8 minutes |
| (6) Campaign Coordinator - closing: | 2 minutes |

WAYS TO “ASK”

One-on-one and Group Presentations can both be effective ways to ask your employees to contribute, and each offers particular advantages.

Review these notes to help you determine which method will be best for your company campaign. Whichever method you choose, remember, personal follow-up with every employee helps ensure everyone is given the opportunity to participate.

Group Presentations

Group presentations are the best way to increase the awareness of United Way, its funded services and programs and its role in our community to the largest number of employees. Simply bring employees together in appropriate sized groups and follow an agenda similar to the one in the sample provided on page 8.

Individual or one-on-one solicitations

This method involves one employee - the solicitor - personally asking another employee to consider participating in your campaign. The solicitor provides information about your United Way, answers questions, gives the employee a pledge form and asks for a contribution.

LEADERSHIP GIVING

Leadership donors exert a major influence in our community through their commitment, generosity and leadership.

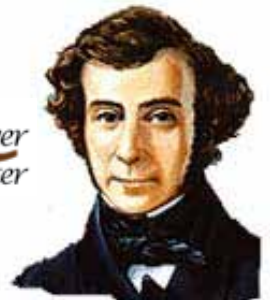
Conducting a leadership giving program in conjunction with your company's annual United Way campaign can also exert a major influence on the growth of your campaign and provides an effective way to involve and solicit giving from different management levels in your organization.

How to conduct a leadership campaign

- (1) Ask your CEO to select a Leadership Giving Manager.
 - This person should be a representative of management and a current leadership donor.
 - Work with this person to coordinate a Leadership Giving Program at your workplace.
 - Ensure that your CEO is involved and adds his or her personal endorsement.
- (2) Determine your solicitation strategy
 - One-on-one personal asks or group solicitation (see page 8 for a description of each method)
 - Host a leadership event (a breakfast, luncheon, or reception) to bring current and potential leadership givers together to share information about the available programs. United Way can help you secure a special speaker.
 - Distribute United Way's Leadership brochure to all current and potential leadership donors. (The brochure details giving criteria and membership benefits for each program.)

- (3) Follow up with a personal thank you to each leadership giver

Red River
Chapter



*Alexis de Tocqueville
Society*



REPORTING YOUR RESULTS

This includes:

(1) Collecting all employee pledge forms

- Collect the pledge forms from all employees, including those contributing gifts of cash or checks and those requesting United Way to bill them directly, as well as those giving via payroll deductions.
- Make sure each employee/donor has signed his or her pledge form.
- Turn in the white (top) copy to the United Way; keep the yellow copy to submit to your payroll department; and have the employee retain the pink copy for his or her records.

(2) Completing the Employee Pledge Report Form(s)

- Please complete a separate Employee Pledge Report Form for each county in which your company has a work location(s).
- Record all donors and the amount of their pledge on the 2-part Employee Pledge Report Form(s) provided (you do not need to record those who turned in forms and did not donate). Retain the yellow copy(ies) for your files and submit the original (white) copy to the United Way along with all cash and check donations.

- This form is also available in an Excel spreadsheet format in the Community Campaign information located under the “Advocate” tab on United Way’s website: liveunitedclarksville.org, liveunitedhouston.org, or liveunitedstewart.org; or, you may request a copy on diskette or CD.

(3) Completing the Corporate Pledge Form

- Complete your company’s corporate pledge information on this form
- Turn in the top (white) copy to the United Way and retain the yellow copy for your records.

(4) Completing the Company Report Form

- Place the totals in the appropriate blocks and please note whether this is your company’s final report or a partial report.
- Please complete a Company Report Form for each county in which your company has a work location.

Place the sticker on the envelope, folder or box containing the copies of all employee pledge forms, the accompanying Employee Pledge Report Form(s), your Corporate Pledge Form, and all cash and check donations you are turning into the United Way.

SAY THANK YOU!

— AND SAY IT MORE THAN ONCE . . .

Saying thank you is the most important part of your campaign. Be sure to thank volunteers and donors for their contributions to the campaign and for what they are helping achieve in our community. Consider the following:

- Thank you posters from United Way
- Display campaign results prominently
- Year-round United Way communications
- Awards lunch/celebration
- Party hosted by the CEO
- Awards presentation at a staff meeting
- Employee newsletter article with names and photos of campaign volunteers
- Campaign mementos (certificates, mugs, notepads, pins)
- Letter from CEO and/or Union Representative

COMPANY AND EMPLOYEE RECOGNITION AND AWARD OPPORTUNITIES

Ben C. Parks Award – instituted in 1990 in honor of the memory of Mr. Parks, this prestigious annual award recognizes the company or organization judged by the Campaign Cabinet to have conducted the best overall campaign effort based upon a wide array of criteria, including: company commitment to the campaign; enthusiasm; campaign activities; results achieved; involvement of United Way and member agency representatives, etc.

“Way to Grow” Award – established in 2006, this new award recognizes the most outstanding new company campaign.

“Above and Beyond” Awards – acknowledge the extraordinary efforts of volunteers serving as a Company Campaign Coordinator or on the Campaign Cabinet who go “above and beyond” what is asked or expected of them as volunteers.

Ambassador’s Award – is awarded annually to the company executive or manager deemed to best exemplify the qualities of a “United Way Ambassador” by setting the example of leadership for their employees, involvement with the United Way, and promotion of the United Way within our community.

Campaigning Toward Potential Award – recognizes the company or organization each year that achieved the highest level of giving in relation to their giving potential.

Campaigning Toward Potential Achievement Awards – This family of five award levels is based on the percentage of employee giving potential achieved:

Award of Excellence	Bronze Award
Gold Award	Recognition Award
Silver Award	

The “Inspire” Award – this new award recognizes the company or organization who inspires its employees to give, advocate and volunteer through the most unique campaigning efforts.