

Notes from Campaign Coordinator's Training

1 Meet and Engage with your CEO

- Send out a personal letter of endorsement from your president or CEO
- Have your CEO be a part of your kick-off (i.e. speech or first pledge turn-in)
- Discuss corporate gift
- Discuss and develop your campaign budget (i.e. giving incentives or giveaways)

2 Recruit a Committee and Plan your Campaign

- Set your campaign timeline
- Ask for help. Keep in mind people who volunteer are involved because they want to be and will lend energy to your campaign
- Decide what your campaign activities will look like (i.e. guest speakers, food, contests, prizes).
- Assign committee tasks and establish deadlines for completion

3 Review and Evaluate Past Performance and Calculate Goal

- Work with United Way staff to find out about your company's giving history
- Review last year's campaign and any feedback you received as to what did or didn't work well
- Incorporate new ideas for this year's campaign

4 Set Employee Goals

- Create a dollar goal and a percentage participation goal
- Have a volunteer project available for employees (Call United Way GCR to plan this 931-647-4291)

5 Promote Leadership Giving

- Discuss with your CEO Leadership Giving matching opportunities
- Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO)

6 Publicize your Campaign

- Share how to pledge, when to pledge and what programs employee pledges support
- Use provided United Way materials (i.e. posters, videos, brochures, website)
- Send email communications to raise awareness about campaign activities
- Create a section on your company's intranet to share information about United Way and your campaign. Be sure to include a link to liveunitedclarksville.org
- Provide incentives to encourage giving (i.e. 2 hour lunch)
- Order United Way t-shirts for everyone (www.unitedwaystore.com)

7 Conduct an Educational Campaign

- Invite United Way staff and guest speakers to present at a large group meeting
- Conduct smaller group presentations for all departments if large meeting is not an option (United Way will be very happy to attend them all.)
- Ensure every employee receives United Way materials (i.e. brochures, pledge forms)

8 Ask Everyone to Give

- Ensure you ask every person to give by asking your committee and any other advocates to reach out to their co-workers
- **The #1 reason people say they didn't give is because they were not asked.**
- Include everyone, both active and retired
- Ask your new hires as part of the HR package

9 Report Results and say THANK YOU

- Recognize individuals, groups and departments that went "Above and Beyond" during the campaign
- Announce your final results to all employees through a communication from your CEO and/or conduct a finale activity
- Thank everyone at the time of giving. Offer a thank you card or small gifts from the company for their participation
- Make a "Thank You" display (hang posters, campaign activity photos and mementos from the campaign)
- Give special thanks to your committee. Hold a special coffee break which everyone receives a special thank you from the CEO
- Collect all pledge forms, cash/checks and place them in an envelope, complete all report forms and schedule a pick-up or drop-off with your United Way

10 HAVE FUN!

- Engage your employees with creative activities that educate them about the work of United Way
- Provide special pledge incentives such as prizes for certain people (i.e. first time donors or leadership giving)
- Volunteer together! Call United Way GCR today 931-647-4291



United Way of the
Greater Clarksville Region