

# PLAYBILL

CAMPAIGN COORDINATOR GUIDE

*play your  
part*



# DEAR FRIEND,

**Thank you for taking action to make a difference in our community through United Way. Your support helps lift up people and neighborhoods, raises hope and lower barriers to success.**

If you are a longtime supporter of United Way, thank you for your ongoing commitment. If you are new to United Way, thank you for joining the fight for a better, stronger Clarksville Region. We are honored to welcome you to our cast of community partners.

Together, we're providing struggling children with positive mentors. We're connecting homeless people with the services they need to get back on their feet. We're providing job-skills training to shift the odds for unemployed youth. We're connecting Veterans and others with housing, mental health and supportive services. We're feeding the hungry, enabling the disabled and protecting the vulnerable.

In this guidebook, you'll learn about the best practices of coordinating a United Way fundraising campaign and ways you can roll up your sleeves and make a difference through volunteerism, too. We hope you find the information helpful. Keep in mind United Way fundraising and volunteer engagement staff members stand ready to support you in every possible way. Don't hesitate to contact us for any assistance that you need.

Thank you again for playing your part to create a brighter tomorrow. Together, we are more than what we can achieve alone. When you give, advocate and volunteer, you join hands to strengthen our community from the inside out. You give someone a fighting chance at a better life.

With great thanks,



**Ginna Holleman**

CEO, United Way of the Greater Clarksville Region



# UNITED WAY OF THE GREATER CLARKSVILLE REGION

## Vision and Mission

United Way of the Greater Clarksville Region is a 501(c)3 nonprofit organization committed to positive community change. Founded in 1956, United Way has earned a reputation as a respected, trusted and effective philanthropic organization. Addressing human-service needs in Montgomery, Houston and Stewart counties, United Way's impact is made possible through the commitment of thousands of volunteers, contributors and community partners.

We fight for the health, education and financial stability of every local resident. Our vision is a community of opportunity where everyone has hope and can reach their full potential. Our mission is to connect people, resources and ideas in order to:

- Ensure basic needs are met for all throughout the region.
- Produce meaningful and measurable results in the areas of youth success, financial stability and health.

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## FOCUS AREAS

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### Basic Needs

Basic needs are essential for survival: food, shelter, clothing, emergency assistance and access to health care, to name a few. United Way supports agencies that deliver a variety of these safety-net programs.



### Youth Success

Too many of our children and youth face challenges that set them back for life: poor preparation for school, stressful home environments and overwhelmed parents, to name a few. United Way strategies give these children a second chance through a continuum of services to address these challenges.



### Financial Stability

Increasing income, building savings, and gaining and sustaining assets are the basics to building a better future. United Way and its partners offer a range of services to help families move toward financial security and, ultimately, upward economic mobility.



### Health

Health is a basic need that affects every aspect of a person's daily life. Good mental and physical health allows children to learn better and adults be independent and productive citizens.

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# STEPS TO A GREAT CAMPAIGN

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Every workplace campaign is different and can be shaped around your organization's culture. Here are the four basic steps and keys to running a successful campaign.



## 1. Prepare

Plan your campaign in advance, and recruit a strong team to help lead your company's efforts.



## 2. Inspire

Share the United Way story with all employees, and connect them with our work to show how their support can ensure a better future for the community.



## 3. Ask

Encourage and ask everyone to make a donation. Every size gift makes a difference.



## 4. Thank

Make sure everyone feels appreciated for their generosity.



# 1. PREPARE

Much of your company's campaign success will be determined by your preparation. The information in this section will walk you through steps to will ensure you are ready to run a successful campaign.

## Develop Your Plan

1. Schedule a meeting with your United Way Resource Development Manager.
  - Review your organization's campaign history, and schedule ongoing meeting dates to plan the campaign.
  
2. Develop a timeline. Include:
  - Best time to run the campaign (start and end dates).
  - Length of campaign.
  - Involvement of all company locations (where appropriate).
  - Campaign team/volunteer training.
  
3. Set goals for the campaign. Consider setting your goal by:
  - Increasing the number of people who give through payroll deduction.
  - Asking employees to consider increasing their gift from the last year.
  - Adding donors who qualify for membership for Leadership Giving societies.
  - Asking for a corporate gift or match.
  
4. Run the campaign.
  - Implement your campaign plan.
  - Publicize the campaign.
  - Ask employees for donations using paper forms or internal online pledging.
  - Schedule volunteer projects or activities.
  
5. Wrap up the campaign.
  - Say thank you.
  - Report results.
  - Collect feedback and ideas for use the next year.

# Develop Your Campaign Timeline

Below is a sample timeline that can be used for a workplace campaign. United Way staff and/or your team captain can help you develop a timeline that's right for your company.

## Ten - Twelve Weeks Before Kickoff

- Select an Employee Campaign Coordinator (ECC).
- Attend ECC training and campaign kick-off.
- Meet with past campaign team to discuss previous campaign successes and challenges.
- Conduct executive briefings with senior leadership to choose campaign positions and responsibilities.
- Finalize steering team and campaign volunteer structure.
- Recruit additional campaign committee members.
- Begin campaign team meetings (meet once per week until campaign). Campaign team meeting should include your United Way resource development manager to help develop specific objectives and strategies surrounding business units and special projects (campaign communications, volunteer activities, kickoff and celebration, Giving Society campaigns and so on).
- Plan a calendar of educational activities and events.

## Six - Eight Weeks Before Kickoff

- Take campaign committee on a tour of a United-Way-funded community service provider.
- Submit requests to United Way for volunteer projects.
- Submit requests for educational speakers.
- Set overall campaign goal.
- Develop Giving Society strategy, identify prospects and set events.
- Finalize theme and communication plan.
- Develop volunteer training schedule, meeting agendas and materials.

## Two - Four Weeks Before Kickoff

- Execute campaign posters, web messages and other communications vehicles.
- Tell United Way stories through articles on your intranet website.
- Recruit volunteers for volunteer projects.

## During Your Campaign

- Execute campaign posters, web messages and other communications vehicles.
- Tell United Way stories through articles on your intranet website.
- Recruit volunteers for volunteer projects.

## After the Campaign

- Announce results to all staff.
- Hold general campaign celebration.
- Send appreciation letters to volunteers.
- Thank donors who supported campaign.
- Send your campaign results and donor information to United Way.
- Hold meeting to discuss campaign outcome and evaluate for next year.

## 2. INSPIRE

You can inspire your company's employees to give generously by educating them about United Way of the Greater Clarksville Region and helping them be engaged in the organization's work.

### Promote and Publicize

Education, storytelling and information are the keys to reaching your fundraising goal. Your United Way development manager will help you create an atmosphere of enthusiasm as you inform employees about how their contributions help change lives in our community.

#### Before campaign:

- Raise awareness of upcoming campaign (see ideas list)
- Thank donors for their previous support.
- Share a schedule of campaign activities.

#### During campaign, provide:

- Information about how to pledge.
- Schedule group volunteer projects through United Way
- Success stories and personal stories.
- Messages asking for donations.
- Employee education.
- Campaign video.
- United Way Speakers Bureau speakers
- Fun, interactive events/incentives/themes/fundraisers
- Information about incentives or matching corporate gifts.

#### After campaign:

- Highlight campaign results.
- Thank donors for contribution.
- Host a fun celebratory event for all participants

#### All year long:

- Follow United Way of the Greater Clarksville Region on social media. You can find us on Facebook (@UWGCR), Twitter (@uwclarksville) and Instagram (@uwclarksville).
- You are always welcome to reshare our content, and let us know if we can help craft your United Way story. Reach out to [jbrown@uwgcr.org](mailto:jbrown@uwgcr.org) any time for tips and suggestions.
- We can also provide your company or organization a "Social Media Best Practices Guide."

## PROMOTION IDEAS

- Company-wide campaign rallies and events
- Internal, energetic email from your CEO or other leadership
- Friendly competition/challenges from your CEO or other leadership
- Ongoing email messages from your campaign chair
- Intranet site
- Volunteer projects
- Posters
- Fliers
- United Way brochures and success stories
- Personalized company video or United Way campaign video
- Employee testimonials (print or video)
- Company newsletter (printed or electronic)
- Promote your partnership on company advertising - print, digital, website, billboard, radio
- Showcase your company's support on external signage and/or digital marquees
- Sharing pictures and messages of your support on social media and tagging United Way of the Greater Clarksville Region
- Highlight an agency each month or quarter
- Sponsor an event that features your partnership with United Way such as a golf tournament, health fair, etc.



# 3. ASK

Asking for a gift is by far the most important step of an employee campaign. The No. 1 reason people do not give is because they were never asked. It is important to allow every employee to make an educated, personal decision about giving to United Way of the Greater Clarksville Region

## Giving

Giving to United Way of the Greater Clarksville Region is the most effective way to improve lives and strengthen our community. United Way's annual allocations process ensures fiscal and program accountability for all agencies receiving United Way funds, while meeting the health and human service needs of our community. Partner agency programs approved for funding have provided evidence and documentation that they meet United Way of the Greater Clarksville Region's standards for: organizational governance, effectiveness of operations, fiscal responsibility, and truthfulness of their representations.

You may elect to allow your contribution to be directed through this process or you may designate to a specific United Way partner agency. Current partner agencies are listed on the 2017-2018 brochure and online at [www.liveunitedclarksville.org](http://www.liveunitedclarksville.org).

## How To Ask

### Include Everyone

- Start at the top – ask company leadership to set the example by making their contributions early.
- Include off-site and remote employees.

### Inform Employees

- Hold a campaign kickoff or rally to start your campaign.
- Invite your staff to discuss the community's needs and ask for support at a specially created or pre-existing staff meeting.
- Create options for an online meeting to reach remote employees or those who can't leave their desks during work hours.
- Keep the meeting brief, lively and informative.
- Thank employees for their participation.
- Make individual peer-to-peer asks for support. This is especially effective when asking for a Clarksville or Leadership donation or engaging new employees.
- Highlight corporate support, especially if your company has a program in place that matches employee donations.



## 4. THANK

The two most important words to remember and the ones people appreciate the most are “thank you.” Thanking everyone involved, from those who donated to those who helped implement the campaign and volunteered their time at community service projects, cannot be overemphasized and goes a long way to ensure their long-term support. There are two great ways to thank donors:

### 1. Thank donors through United Way.

- Share the details of who gave to the campaign so United Way can thank individual donors. Letting United Way thank donors directly will also help your campaign going forward to retain donors.
- Ensure United Way is provided with donor addresses and email addresses so that thank you communications can be received. (Unless donor wishes to remain anonymous)

### 2. Thank donors through the workplace campaign.

- Post thank you posters around your workplace.
- Send thank you letters or e-cards from your CEO, ECC and Leadership Giving chair.
- Highlight givers of a certain level in a public space.
- Host an event for donors who give at a certain level.
- Give a special gift or host a special reception for campaign team leaders and your campaign committee.
- Publicize results via your company newsletter, email or intranet.

## Report Results

Timely reporting of the results of the campaign is an important part to wrapping up your United Way campaign.

- Throughout the campaign, collect all cash, checks, pledge cards and other gift information.
- Keep special event donations separate from individual contributions.
- Where possible, proof paper pledge forms submitted by donors to make sure they are filled out correctly.
- If you don't use United Way's paper pledge forms, provide your United Way development with donor details, such as names, emails, addresses and donation amounts for tax purposes and recognition, including membership information for United Way giving societies they qualify for.
- Schedule a time with your United Way development manager to visit and pick up campaign results.

## Plan For Next Year

Getting an early start to next year's campaign allows you the opportunity to execute an even more successful campaign in the future.

- Gather feedback about the campaign from senior leadership, the campaign committee and United Way staff.
- Leave notes and resources for campaign leads to use next year.
- Identify next year's ECC and have them plan to attend future United Way ECC training sessions.
- Implement a new-hires program to give new employees the opportunity to contribute when they join the company and learn more about how United Way supports our community.
- Work with United Way to develop and hold year-round individual or group volunteer events.
- Implement a year-round communications plan that shares the impact of United Way's work in the community with your employees.



# FAQS

## **My workplace (or I) am limited on time to devote to a campaign. How can it fit into a busy schedule?**

The best way to ease the strain is to recruit a committee, assign tasks and start planning early as a team. Also, be sure to reach out to our staff anytime extra help is needed.

## **How long should our campaign run?**

The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources for both the ECC and employees. One to two weeks is the perfect amount of time to kick off your campaign, get the message out effectively and make your ask without overburdening staff. An exception to this could be if you are the ECC at an exceptionally large company with many different work sites.

## **When should our campaign take place?**

Most campaigns take place between mid-September and mid-November, but they can happen any time best suited for your company.

## **How can employees give?**

Using a United Way of the Greater Region pledge form, employees can give via payroll deduction, cash or check. You can also give by credit card through United Way's website at [www.liveunitedclarksville.org](http://www.liveunitedclarksville.org). Speak with your United Way resource development manager for more information on all giving options.

## **Can donations be designated to a certain agency or program?**

United Way of the Greater Clarksville Region honors designations only to current partner agency programs. A list is provided on brochures and on the website at [www.liveunitedclarksville.org](http://www.liveunitedclarksville.org). Donors may elect to designate their gifts to one or more agencies by indicating their choice on the pledge forms.

## **When does payroll deduction start?**

Payroll deduction usually runs Jan. 1 through Dec. 31. However, United Way does not set your payroll schedule; it is a company decision and can be run on a period best suiting your workplace.

*For any additional questions, we welcome you to reach out to Sarah Wood, Community Engagement Director, at [swood@uwgcr.org](mailto:swood@uwgcr.org) or (931)647-4291.*



## RESOURCES

### **Campaign Communications**

Contact your United Way Communications Director to ask questions, schedule campaign speakers or get any information needed to help you run a successful campaign. We are here to help you energize, engage and inspire employees throughout your campaign. Contact: Julie Brown: [jbrown@uwgcr.org](mailto:jbrown@uwgcr.org)

### **Volunteer Engagement**

Meaningful impact and lasting change is strengthened when people go where their time and talent is needed and raise their hand to help. Contact our staff to help get you and your team connected with valuable volunteer opportunities and develop a volunteer engagement plan custom tailored to your workplace. Contact Sarah Wood: [swood@uwgcr.org](mailto:swood@uwgcr.org)

### **Website**

Visit [www.liveunitedclarksville.org](http://www.liveunitedclarksville.org) to learn about our work and partners. You can also download campaign materials, success stories, posters, videos, photos, logos, sample emails and other helpful campaign tools. You and your team can also connect with local volunteer opportunities.

### **Social Media**

Be sure to follow United Way of the Greater Clarksville Region on social media – and encourage your employees to as well. You'll find us on Facebook, Twitter, Instagram, LinkedIn and YouTube. Feel free to always use #LiveUnited in your posts, and please tag @uwclarksville so we can share your stories.



Change doesn't happen alone – and it doesn't happen just through fundraising. Every year, United Way's volunteer engagement department offers groups and individuals unique community service opportunities.

### **Benefits of Volunteerism**

- Enhance teamwork skills
- Provide hands-on training opportunities through skill-based projects
- Increase leadership skills
- Increase productivity
- Provide a service and product to the community
- A priceless sense of pride and accomplishment for your community

There are two ways you can volunteer through United Way of the Greater Clarksville Region:

### **Group Volunteering**

United Way will help connect your employee teams, social groups, service organizations, families or friends to meaningful volunteer experiences that impact lives within our focus areas. Whether it's one-day activities or quarterly projects, our United Way staff is available to assist you through the entire process.

### **Individuals**

In addition to group opportunities, there are several individual community-service options available. United Way can help your team members connect with service opportunities best matching their time, talents and interests.

# DIVERSE VOLUNTEER OPPORTUNITIES

Establishing an Employee Volunteer Program can include a diverse collection of volunteer experiences. Not all types of volunteering are a good fit for all people. Some employees may enjoy working outside in a community garden, another may wish to establish on-going mentoring relationships, while others prefer to serve during periodic on-site projects. It's important to structure your program to best suit the engagement interests and abilities of your team.

## Custom Projects

United Way can customize a project based around your availability and group size. If your team would like to create a new project to make a difference, we can help coordinate those projects with local organizations or individuals in need.

## On-Site Service Projects

Host a volunteer event or drive at your office or community facility. A list of examples can be found on our website at [www.liveunitedclarksville.org](http://www.liveunitedclarksville.org)

## Volunteer with Local Organizations

Lend your team's time and talents to assist with the needs served by our local community partners. Visit our 'Volunteer United' website or work with our team to get connected.

## Day of Action & Signature Events

Whether with a group or on your own, United Way and partners collaborate on annual large-scale community volunteer events.

## Individual Opportunities

Employees can sign-up for local volunteer opportunities through Volunteer United or work with our Community Engagement Director to find a match best suited to individual interests, abilities and time - whether with community partners or through United Way committees.



# VOLUNTEER UNITED

United Way of the Greater Clarksville Region provides the convenience and advantage of online access to local volunteer engagement. Whether promoting opportunities for individual employees or managing custom corporate projects and events, **VOLUNTEER UNITED** offers innovative resources as your team's hand-raiser headquarters.

## Core Features

- Desktop and mobile, user friendly site
- Easily register workplace volunteer teams
- Generate valuable volunteer engagement data, tracking and reports
- Create individual volunteer resumes
- Stay connected with community volunteer needs

Just visit <https://www.uwgcr.galaxydigital.com> to get started. Our Community Engagement team offers personalized support at any time along the way.



# VOLUNTEER UNITED

Hand-Raiser Headquarters for the Greater Clarksville Region



Get Involved, Make a Difference.

[VOLUNTEER NOW](#)

[Click here to register your organization.](#)



**Stuff the Bus** Volunteers are needed to greet shoppers, collect supplies, organize supplies, and box supplies.

VOLUNTEER



**Monday Drivers for Manna Cafe**

Drive a route to rescue food from stores that would be thrown out to support Manna's mission.

DRIVE



**Wonder Kids Triathlon**

Bike, swim, and run your way to the City of Clarksville Parks and Recreation - they need your help for this event

VOLUNTEER

**BECAUSE CHANGE DOESN'T HAPPEN ALONE**

**THANK YOU**

for playing your part.



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