

UNITED WAY CAMPAIGN GUIDEBOOK

for Coordinators **2011**

With step-by-step instructions
and creative ideas for conducting a successful United Way
campaign in the workplace.



PO Box 317 Wentworth, NC 27375
Phone: 336-342-7768 Fax: 336-342-7736
www.uwrockingham.org

To our important partners in caring...

Dear Campaign Coordinator,

THE CLOCK IS TICKING!!! Every day of the year, every hour of the day, a United Way funded partner agency is making a difference in people's lives right here in Rockingham County. At 7:00 a.m. Bill drops off his six year old daughter at the Eden YMCA for before school child care. At 11:00 a.m. an elderly lady opens her door to find a friendly face and a hot meal from the Meals on Wheels program. At 3:00 p.m. a family receives support and care for an ill family member from Rockingham County Hospice, and at 11:00 p.m. a man is safely removed from a wrecked car by the Reidsville Rescue Squad using the *Jaws of Life*.

Many of the services that our United Way partner agencies are providing around the clock are experiencing cuts in their state funding. We do not know the full impact of these cuts. The cuts are so deep that some of those agencies now face the possibility of closing their doors. If they do, the people in Rockingham County who need help during these difficult times will not receive it.

Difficult times are the times when the people of Rockingham County have traditionally been their very best. So now, we have a great opportunity! This is the time for us to step up and help by giving to our local United Way of Rockingham County Campaign.

The success of this year's county-wide United Way campaign depends largely on your leadership in your local campaign. By naming you as their campaign coordinator, your organization has expressed a lot of confidence in you. We, too, are confident that you will lead a great campaign.

This Coordinator's Guide was developed to assist you as you plan and conduct your campaign. You'll find many proven techniques and creative ideas to help generate interest and contributions. If you have any questions, or need additional materials, the United Way staff will be happy to help you. Just give them a call at 342-7768 and they will gladly provide whatever assistance you need.

Again, thank you for your commitment. And best wishes for great success in your 2011/2012 campaign!

Nelson Cole

Nelson Cole, 2011/2012 Campaign Chair
United Way of Rockingham County

Making your campaign work!

Follow these steps!

ONE: REVIEW PAST PERFORMANCE

Take a few minutes to evaluate the performance of past United Way campaigns. This can offer ways to build upon previous successes as well as avoid past mistakes or oversights.

TWO: CONFIRM CEO/ORGANIZATIONAL HEAD SUPPORT

Get the organization's leadership involved. Don't underestimate the impact that "leading by example" can have on your campaign.

THREE: RECRUIT A TEAM

Just like football, this is a team effort. Spreading the responsibilities among capable co-workers will lighten the load and ensure a better campaign.

FOUR: REVIEW CAPACITY - SET GOAL(S)

Avoid setting your goal too high or too low. This section will show you how to calculate potential contributions and develop obtainable goals.

FIVE: SELECT SOLICITATION METHOD

Determine what solicitation method will work best for your organization. Delivery of the request is just as important as the message itself.

SIX: SELECT CAMPAIGN TIMETABLE

Create a campaign calendar to help manage your campaign within your company's timetable as well as the overall United Way timetable.

SEVEN: PUBLICIZE THE CAMPAIGN

Simply put...how to get your message to the employees!

EIGHT: CONDUCT EMPLOYEE CAMPAIGN

Make your efforts count when it's show time.

NINE: REPORT YOUR RESULTS

Complete the United Way forms and tally the results of the campaign. You may qualify for county-wide recognition!.

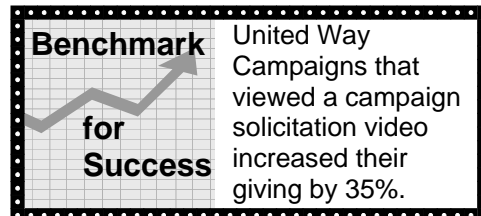
TEN: SAY THANK-YOU

Express your appreciation for those who assisted in delivering a successful campaign, and especially for the donors who are helping our community to **LIVE UNITED.**

Review Past Performance

Arrange to meet with the person(s) that directed the company's campaign in past years.

- ⇒ *What worked best?*
- ⇒ *What were problems?*
- ⇒ *Was each employee informed about United Way?*
- ⇒ *Was the CEO/OH visible and supportive?*
- ⇒ *Was payroll deduction available?*
- ⇒ *Were the employees able to see the agencies by tour or video?*



Review your company's giving history.

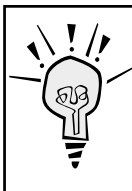
Having a thorough understanding of the previous year's results will provide comparative information for your organization as well as others in the county!



And it came from...

per capita:
Medieval Latin, by heads
meaning: per unit of population

\$ _____ Last year's giving	divided by	_____	=	\$ _____ Per Capita gift
		# of employees		
\$ _____ Last year's giving	divided by	_____	=	\$ _____ Average gift
		# of givers		
\$ _____ Amount given by payroll deduction	divided by	_____	=	\$ _____ Average payroll deduction gift
		# of payroll deduction givers		
\$ _____ Amt. given other than payroll deduction	divided by	_____	=	\$ _____ Average gift for non-payroll givers
		# of givers not using payroll deduction		



Something to think about...

What if 20% more employees gave the payroll deduction average gift?
What if the number of givers increased by 20%?

Confirm CEO/OH support

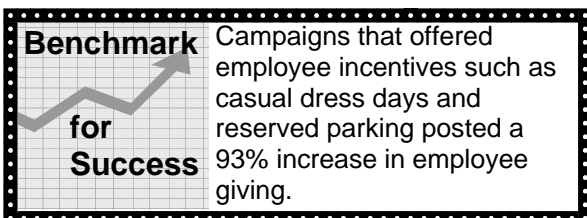
Your Chief Executive Officer/Organizational Head's (OH) support is essential! They should be called on to ask for full support of your efforts. The fact that you were selected to serve as the coordinator for your United Way campaign shows that he/she has confidence in you to achieve success and will want to support you in any way they can.

Meet with the CEO/OH to review your plans and request company leadership to:

- 1 Write a letter to managers announcing your role as Coordinator of the United Way campaign and asking for their support and cooperation.
- 2 Write a letter to each employee endorsing the campaign and urging him or her to support the effort.
- 3 Participate, as time allows, in meetings to make a personal endorsement.
- 4 Allow time for training, agency tours and group meetings.
- 5 Agree to a budget and incentives for employees as well as volunteers.

Ideas for incentives are unlimited

- Time off from work
- Casual dress day
- Tickets to games/movies
- "Sleep-in" passes
- Grocery certificates
- Dinner for two
- Hotel getaways, etc...



Dear Employee:

The time is quickly approaching, when those of us fortunate enough to have jobs and our health have the opportunity to help create a better community through our local United Way. XYZ Company has been a consistent supporter of United Way and its programs, and we hope you will assist in continuing our support of our community.

Why United Way? The enclosed brochure describes the United Way services for the very young, very old, the sick, developmentally disabled, the dying...even your family! If a family member has been in Scouting, had a blood transfusion, or has been helped by the Salvation Army or Hospice, your family has benefited from United Way.

How much? The amount you pledge is a matter of conscience and ability to give. The back of the enclosed pledge form outlines the various levels of giving, all of which are greatly appreciated.

Where does my money go? Most of your pledge stays right here at home. In fact, 99 cents of every dollar goes to services in Rockingham County. By giving through United Way, your one gift helps more than 20 local agencies and thousands of our neighbors.

How do I contribute? Plan to attend our United Way rally on _____ where you'll hear from a United Way representative who volunteers their time to talk about this important campaign.

One last word! To those of you who are continuing contributors, please consider increasing your gift this year. To those of you who are not currently contributing to our campaign, please reconsider. The additional contributions will help support vital services in our local community...a community in need.

Thank you

CEO/OH



Timing is everything!

For maximum effectiveness, the CEO/OH letter should be mailed a week before the campaign or included as a payroll stuffer in the pay check prior to campaign.

THREE


Recruit A Team

You are a tough-fighting, goal-busting, campaigning machine!

No matter how well organized you are, it is impossible for any one person to fulfill all the duties involved in executing a successful employee campaign. Increasing the number of people who become involved in the campaign increases the base support for United Way.

Recruit the help of a group of employees that is representative of the levels of positions in your company. Get their input and ideas. Together decide on the best campaign plan for your company.

- ⇒ Select employees from all major areas. Choose the natural leaders in the various departments to help you. The optimal ratio is one campaign volunteer for every ten employees.
- ⇒ Try to include recent converts as well as long-time supporters of United Way.
- ⇒ Assign specific duties and responsibilities to team members according to their talents and skills.
- ⇒ Provide training for volunteers.
- ⇒ Allow volunteers to get to know the "product" they sell. Visit UW agencies.
- ⇒ Meet regularly, establish a timetable and keep track of progress.

<p>Did you know? Companies spend millions of dollars annually on team-building activities such as whitewater rafting. Working together on a United Way campaign not only stimulates team bonding, but benefits a good cause...all without getting soaked!</p>	
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Your Team Players


Name	Responsibility	Phone	E-mail
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

United Way Contact: _____ **Phone:** _____

FOUR

Review Capacity - Set Goal(s)

Having a common goal for your United Way campaign serves the same purpose as your production, efficiency or other organizational goals. It provides a point of focus for all involved that allows you to see where you may be running short, and provides an opportunity to take corrective action.



Who sets the county-wide goal?

The county-wide United Way goal is proposed by the Campaign Cabinet after reviewing community and agency needs as well general economic factors. The final goal amount is voted on by the United Way of Rockingham County Board of Directors.

Set Goals by Campaigning Toward Your Capacity

	X		=	
Avg. Salary		# of Employees		Estimated Annual Payroll
	X		=	
Est. Annual Payroll		Fair Share*		Capacity
	-		=	
Capacity		Amt. Raised Last Year		Unrealized Capacity

Meet with your CEO/OH and compare your company's past performance and capacity. Your goal should be based on your potential to improve. Aim to achieve a higher percentage of your capacity.

EXAMPLE:

	+		=	
Amount Raised Last Year		10% of Unrealized Capacity		This Year's Goal

Ask: "What if..."

- ⇒ The number of payroll deduction givers increased?
- ⇒ The amount given by existing givers increased?
- ⇒ Every employee gave \$1 per week?
- ⇒ Those giving \$1 a week, gave \$2 per week?
- ⇒ The number of "Fair Share" givers increased?



Benchmark for Success

Campaigns that set goals and tracked their progress along organizational lines raised 62% more funds.

*Fair Share is one hour's pay per month or .006 of Annual Salary

FIVE

Select Solicitation Method

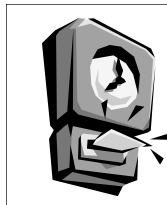
Employees must be well informed about the United Way if your campaign plan is to succeed. Any employee has the potential to become a generous giver, but only when asked. There are two ways of “making the ask.”

GROUP MEETINGS

Group meetings are a fast, efficient way of contacting all employees. Employees are brought together in small groups to hear a United Way presentation and to see a video featuring various agencies. Personalized pledge cards are distributed and employees are asked to return their completed cards as they leave the meeting. You may follow up on those who do not attend or who do not return their pledge cards on an individual basis.

Effective group campaigning:

- ⇒ More efficient use of time
- ⇒ Uniform message
- ⇒ Less follow-up required
- ⇒ Flexible method accommodates the work schedule of all parts of the company
- ⇒ Fewer campaign workers need training
- ⇒ Employees receive an educated message about United Way



On a tight schedule?

To minimize loss of time on the floor, consider scheduling your United Way meeting as part of a pre-scheduled employee or safety meeting.

ONE-ON-ONE

With the one-on-one approach, a campaigner meets with each employee individually to ask for his or her contribution.

Effective one-on-one campaigning:

- ⇒ Recruit one campaigner for every ten employees
- ⇒ Recruit campaigners who:
 1. are fair-share givers
 2. are from all levels within the company
 3. are well-liked and accepted by their peers

Conduct a one-hour orientation session for all campaigners. Educate them about United Way and instruct them on solicitation techniques (for your convenience, training is available from your United Way of Rockingham County.)

Select Campaign Schedule

In order for your campaign to run smoothly, it is helpful to establish a timetable. It should be in line with the framework of the overall United Way campaign. Most importantly, it should avoid any potential conflicts with other fundraisers and solicitation-based events within your company such as 401-k and retirement plan enrollment. Using a personal timetable will help you keep track of your tasks.

BEFORE CAMPAIGN:	DATE
1. Review past performance	_____
2. Meet with CEO/OH	_____
3. Recruit Campaign Team	_____
4. Ensure all is ready for payroll deduction	_____
5. Meet with United Way of Rockingham County	_____
6. Determine capacity and set goal	_____
7. Conduct orientation sessions with all campaign volunteers	_____
8. Plan publicity and set schedule	_____
Consider: Agency Tours	
Agency Speakers	
9. Personalize pledge cards	_____
10. Send out endorsement letters from:	_____
CEO/OH	
Managers	
11. Set schedule for employee group meetings	_____
 DURING CAMPAIGN:	
1. Solicit Executives and Managers	_____
2. Supervise employee group meeting schedule	_____
3. Publicize (to employees and United Way) interim pledge reports	_____
4. Wrap-up (Complete meetings schedule - any make-up sessions - account for all pledge cards)	_____
 AFTER CAMPAIGN:	
1. Total Results	_____
2. Send results to United Way of Rockingham County	_____
3. Publicize campaign results	_____
4. Thank your volunteers	_____
5. Thank your co-workers	_____
6. Critique campaign with campaign team and provide written summary for next year	_____

SEVEN

Publicize the Campaign

Promotion

Share the excitement of your campaign! Determine the appropriate strategies for getting the United Way message to employees.

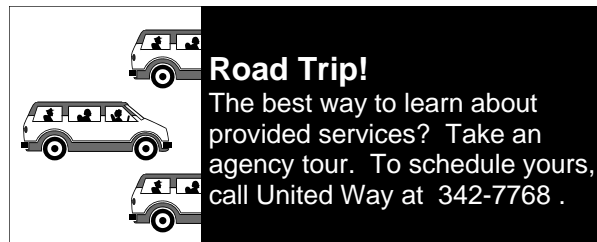
Use United Way brochures, posters and other materials to build awareness of the campaign. United Way of Rockingham County provides them at no cost to you.

Talk up United Way in employee newsletters, e-mail and other in-house communication tools.

Purchase items from United Way catalog such as pens, t-shirts or whatever your budget can afford.

Education

No one likes to give their hard-earned money away without knowing where it goes. The more the employees learn about the agencies and services, the more they may want to support them.



Agency Tours

Agency tours are one of the most effective ways of learning about the services that we fund. A quick 15-30 minute visit will deliver many more unforgettable images than just viewing brochures and videos alone. Even if a select few employees or managers participate in the tour, they can share what they see with others and reinforce the need for their support.

Agency Speakers

Most United Way agencies have staff members and volunteers willing to come to your workplace and share with your employees the work that their agencies do in our community.

EIGHT

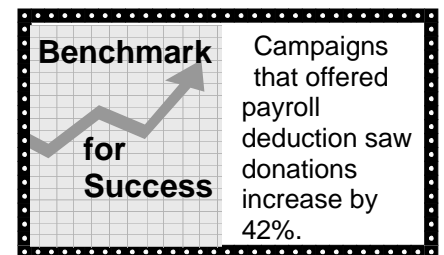
Conduct Employee Campaign

You can find campaign success with a K.I.S.S.
No, not a kissing booth...a K.I.S.S. campaign:

Keep It Short and Sweet

Schedule brief, intensive campaigns to keep enthusiasm high. One to two weeks should do. Also to ensure success...

1. Make sure payroll deduction is available.
2. Plan a company-wide Kick-off.
3. Use United Way provided speakers in group meetings.
4. Show a video (obtainable from United Way office).
5. Encourage payroll deduction giving.
6. Encourage "Fair Share" giving.
7. Be available to respond to employee concerns with the help of a United Way representative.



-Explain Pledge Form

-Distribute brochure or agency list to every employee

8. Report campaign progress to CEO and keep employees informed of giving results.
9. Wrap up with plan to contact employees who missed the campaign meetings.
10. Offer the option of moving to the next level of giving with Leadership Giving.
11. Mention all incentives, promotions or contests available for contributors.

Report your Results

TO YOUR EMPLOYEES

Celebrate the success of your United Way campaign.
Use goal posters, company newsletters or bulletin boards.

TO UNITED WAY of Rockingham County

Ensure the following forms are completed, as appropriate:

WHITE copy goes to company PAYROLL
YELLOW copy goes to UNITED WAY office
PINK copy goes to DONOR as a receipt

PLEDGE FORM

Don't forget your home address!



United Way
of Rockingham County

LIVE UNITED

I. My Information

Name _____
Home Address _____
City/State _____ Zip Code _____
Phone _____ E-mail (optional) _____

Tax Deductions
The IRS now requires that you keep a receipt of ALL tax-deductible contributions that you file with your tax returns, regardless of the amount.

PLEASE KEEP THE PINK COPY FOR YOUR RECORDS.

II. My Pledge

(How much should I give? Use the convenient Giving Guide on the reverse side!)

Payroll Deduction: \$ _____ each pay period for a total gift of \$ _____.

One-Time Gift: \$ _____ is attached as cash or check made payable to United Way.

Direct Bill (\$25 minimum pledge): Please bill me for \$ _____ one time quarterly monthly

Signature _____ Date _____

Total amount of pledge should be entered here.

Total Gift

\$ _____

Amount Enclosed

\$ _____

Balance Due

\$ _____

Signature is required to approve payroll deduction

III. My Choice

- Building Strong Community.**
"Please use my gift for all the programs and services supported by United Way of Rockingham County."
- Targeted Impact Area** "Please use my gift for the Impact Area(s) checked below..." (see brochure for descriptions)
- Provide Basic Needs** **Ensure Public Safety** **Help Children and Youth Succeed**
 Optimize Community and Individual Health **Enable Older Adults**
- Specify Agency (\$50 minimum pledge)**
"Please use my gift for a specific agency (see brochure) OR forward to another United Way (\$25 minimum pledge):"
Name of Agency or United Way _____

IV. My Recognition

I have been a Loyal Contributor (giving to any United Way) since _____ (Year)

I WOULD LIKE TO BECOME A MEMBER OF THE PILLAR SOCIETY. (\$500 minimum contribution)

Please combine my gift with my spouse's gift to qualify for Pillar Society membership.


Spouse's Name: _____ Employer: _____ Spouse's gift: _____

NEW ITEM!

Corporate Pledge Information goes here.

REPORT ENVELOPE

Letters correspond to totals from Summary Sheet.



United Way of Rockingham County
 P.O. Box 317
 Wentworth, NC 27375-0317
 336-342-7768 Fax 336-342-7736
 www.uwrockingham.org

(Affix Label Here)

Campaign Coordinator Checklist

- Envelope filled out completely and signed.
- Corporate Gift card enclosed.
- Billing address for Payroll verified.
- Summary sheet completed and enclosed.
- Campaign Awards Worksheet completed and enclosed.
- White copy of pledge forms delivered to employer payroll department.
- Yellow copy of pledge forms to United Way enclosed with any cash/checks attached.
- Pink copy of pledge forms given to donor as receipt.

Together we do what matters.™

**Thank you for supporting
United Way of Rockingham County**

**United Way of Rockingham County, Inc.
Campaign Report Envelope**

	Number of Participants	Total Pledged	Total Enclosed	Balance
Corporate Contribution		\$	\$	\$
Employee Cash/Check		\$	\$	\$
Employee Direct Billed		\$		\$
Employee Payroll Deduction		\$		\$
Employee Total	A	\$	B \$	C \$
Campaign Totals <small>(Employee Totals + Corporate)</small>		\$	\$	\$

of Full-Time Employees _____

of Part-Time Employees _____

Total # of Employees _____

CEO: _____ Contact Person/Coordinator: _____

Billing Address: _____ Telephone: _____ Fax: _____

_____ Date Payroll Deduction Begins: _____

Signature: _____ Date: _____

FOR UNITED WAY USE ONLY

Date: _____

Audited by: _____

Supervisor's Initials: _____

Employee pledge information goes here.

Totals from each column.


THANK VOLUNTEERS AND CAMPAIGN TEAM


- ⇒ Sponsor breakfast or lunch with CEO/OH to say "Thank You."
- ⇒ Publish names in company newsletter or give other recognition.
- ⇒ Company should provide special gift to volunteers such as special pins, mugs, t-shirts, etc.

THANK ALL EMPLOYEE GIVERS

- ⇒ Say thank you during departmental meetings.
- ⇒ Use company newsletter to thank givers.
- ⇒ Send a letter of appreciation from your CEO/OH.
- ⇒ Place United Way "Thank You" posters in break areas.
- ⇒ Sponsor a thank-you celebration.

	Thank-You... <i>Gracias</i> - Spanish <i>Gratulor</i> - Latin <i>Grazie</i> - Italian <i>Tak</i> - Danish <i>Shukran</i> - Arabic <i>Asante</i> - Swahili <i>Mahalo</i> - Hawaiian
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	Floating on their success! Morehead Memorial Hospital of Eden celebrated the end of their campaign by holding an ice cream float social for all employees.
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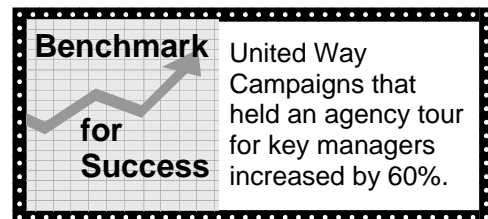
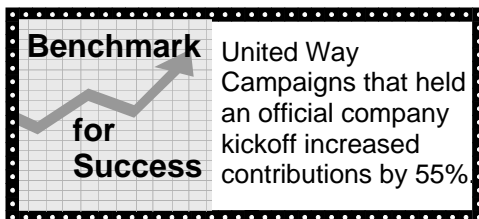
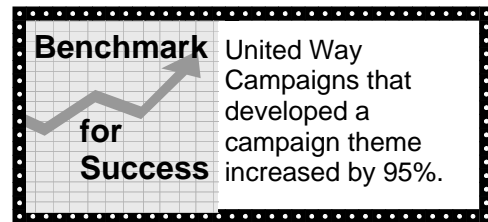
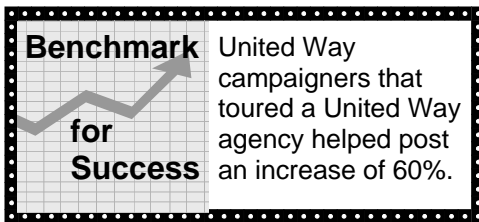
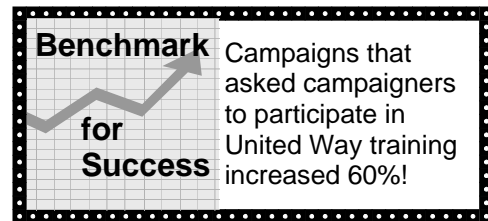
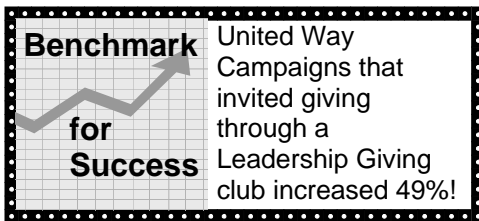
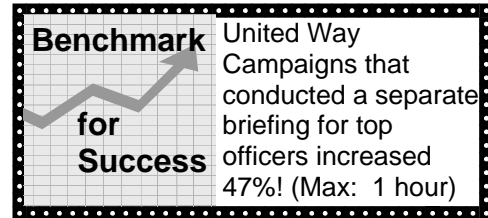
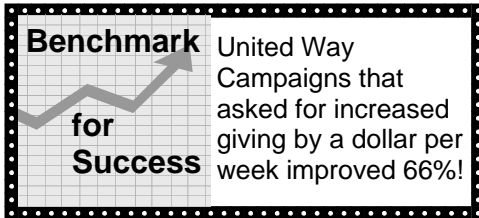
 Benchmark for Success	Campaigns that held a thank-you celebration at the end posted a 53% increase in the following year's campaign.
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United Way pins are available for your givers. If they are not provided in your coordinator's packet, contact the United Way office to place your order.

WINNING WAYS

Other Benchmark Techniques

These additional Benchmark Techniques have been proven effective in organizations of all sizes. The more you use, the more success you will find!



Benchmark technique reports are obtained from the campaigns of United Way Worldwide's National Corporate Leadership Companies.

WINNING WAYS

Campaign Extras

Adding a new "twist" to your campaign will liven things up and probably result in increased giving. Research shows that an enjoyable campaign leads to a higher rate of giving. For example, you can have a:

Bake Sale	Company Picnic	Scavenger Hunt
Book Sale	Auction	CEO/Employee Job Switch
Dress Down Day	Dunk the Boss	Thermometer Design Contest
Flea Market	Group competition	Recognition in Employee Newsletter
Parking spaces	Vacation Days	Sleep-in late days
T-shirts, mugs	Free cafeteria meals	Out of town getaways

Announce ahead of time that prizes will be given away to increase attendance at group meetings. Any idea you use should attract the attention and participation of your fellow employees.

Incentives can also be used to encourage participation at a particular giving level. Fair share and the incentives don't have to be expensive!

Can you think of any ideas that your fellow workers would enjoy?

Successful Events

Ball Corporation of Reidsville's campaign committee served lunch to the homeless and unemployed at the Eden Salvation Army feeding program. Committee members shared details of the service with co-workers during the following campaign and experienced a subsequent increase.

Annie Penn Hospital of Reidsville holds fundraisers such as an employee car wash to raise money and increase awareness of the United Way campaign.

Rockingham County Government provides a number of contests during their campaign such as counting jelly beans, auctions and identifying baby pictures of county employees.

WhiteRidge, Inc. increased the level of communication with its Hispanic employees by providing Spanish print materials and video, which is available free of charge from United Way.