

Campaign Coordinator

RESOURCE GUIDE



2011 CAMPAIGN

LIVE UNITED™



LIVE UNITED™

Dear Campaign Coordinator,

Welcome to the United Way Campaign! As Campaign Coordinator for your organization, you have a key role in making your United Way campaign a success. Your selection as a Campaign Coordinator shows the confidence your company has in you and also its support for United Way.

You are about to begin a challenging, yet rewarding experience. Your dedication and enthusiasm for United Way are key to making York County a better place for all of us to live, work and play. When people choose to support United Way, they choose to make an investment in our community.

We are fortunate to live in a community where so many different organizations do so much to improve our quality of life. With a large number of agencies serving a wide variety of urgent needs it can at times be a challenge to find the right place to get involved in a way that really makes a difference. That's what makes the United Way of York County so special; supporting 34 local partner agencies our organization is the best way to make a substantial impact on the lives of the people who need it most right here in our community.

I am honored to have the opportunity to lead this community as campaign chair of the 2011 United Way Campaign. I'm asking you to GIVE if you can, to ADVOCATE to anyone who will listen, and to VOLUNTEER your spare time. I'm asking you to join me and LIVE UNITED – working together we can make a difference here in York County!

On behalf of the thousands of people who will benefit from the money you help raise, THANK YOU!

Silvia Dugan
2011 Campaign Chair
President & CEO, Print-O-Stat

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What is a Workplace Campaign?

A workplace campaign gives your organization the opportunity to exemplify their corporate commitment to improving people's lives. It also provides several benefits to your organization:

- Opportunity to learn new teamwork and morale-building activities
- Learn simple ways for your company to give, advocate and volunteer
- Increased internal communication and common purpose
- New and enhanced relationships with key community leaders and officials

United Way Campaign Coordinator

Reports to: Your CEO

Partner: United Way Staff

Objective: Plan and implement a fun, informative and successful United Way Campaign.

Job Description:

- Recruit a strong team of employees to help you run the campaign.
- Work closely with a United Way Loaned Campaign Associate and United Way staff member to develop an effective campaign plan, set campaign goals, and determine a timeline that works for your company.
- Hold a United Way rally or presentation.
- Provide information about United Way of York County to enable employees to make educated giving decisions.
- Coordinate the distribution and collection of campaign materials and pledges.
- Prepare and submit final reports and pledge forms.
- Thank campaign participants and donors.

Benefits:

- Develop and strengthen leadership and organizational skills
- Get important face time with employees
- Get directly involved in fundraising activities to help others in the community
- Network with others at training and events
- **HAVE FUN!**



“We always have lots of fun planning our campaign. Not only do we get to help our community, but it’s a chance for us to get creative and develop a theme for our campaign each year. It’s what we love to do!”

**Judy Hanist
Retired Campaign Coordinator
Perform Group**

Online Workplace Campaign Toolkit

You will find an abundance of support through the Workplace Campaign Toolkit, located online at www.unitedway-york.org. Click on the “Campaign” tab in the upper left hand corner of the page. This online information will supplement the information in this handbook. Additional resources and downloadable materials for your use in your Workplace Campaign include:

Forms: Pledge to the campaign, track and record campaign success, and report your results.

- Employee Pledge Form
- Spanish Pledge Form
- Corporate Pledge Form
- Campaign Report Form

Campaign Materials: Collateral to support your campaign.

- Campaign Material Request Form
- Campaign Video
- Your United Way in Action
- Campaign Poster
- Incentive Poster
- Thank You Poster
- Campaign Thermometer

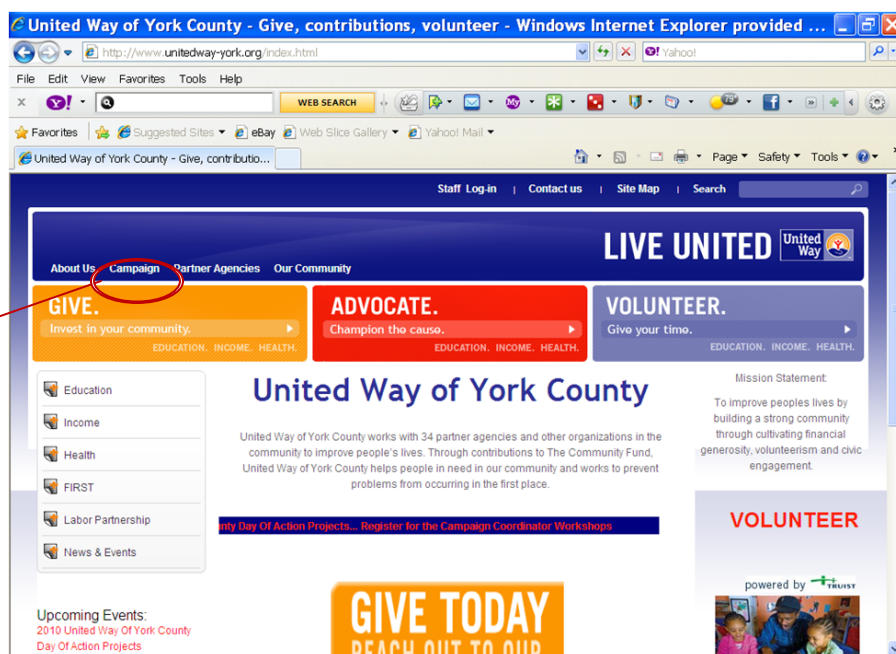
Other Campaign Resources: Other materials and messaging to help run a successful campaign.

- Campaign Coordinator Resource Guide
- Campaign Fact Sheet
- Allocations Sheet
- Partner Agency Information Guide
- United Way of York County Elevator Speech
- Campaign Staff Contacts
- Sample Employee Meeting Agenda

Campaign FAQs & Useful Links: Help you answer common questions.

- United Way of York County FAQs
- United Way of York County History
- Mission Statement and Values

Click **Campaign** to access your Online Workplace Campaign Toolkit!



Workplace Campaign Plan: Your Roadmap to Success

United Way has a **roadmap to campaign success**. Follow these “**8 Steps**” and you have a greater chance of achieving your campaign goals.



1. CEO Support and Involvement

- Pledge a company gift (if applicable).
- Commit to holding employee meetings.
- Conduct a senior management briefing.
- Visibly and actively support the campaign.
- Pledge a personal leadership gift.

2. Recruit a Campaign Committee

- Include one person from each department on your committee. Involve labor representatives if applicable.
- Send the Campaign Coordinator and Committee to a United Way workshop.

3. Set a SMART Goal and Track Results

- Analyze past performance.
- Set an ambitious goal that stretches your team. Goals can include dollars raised, percent participation and/or leadership giving goals.
- Advertise the goal.
- Track and report progress.

4. Work with United Way staff to Develop a Plan to Share United Way Information

- Meet with United Way staff person to plan “8 Steps” campaign.
- Use United Way campaign tools and materials.
- Secure resources for the campaign.
- Plan FUN! How does your company **LIVE UNITED?**
- Build United Way awareness and publicize campaign events.
- Promote Campaign Drawing prizes.

5. Conduct a Leadership Giving Campaign

(Focus on gifts of \$1,000 or more)

- Conduct a leadership giving meeting prior to the start of the campaign.
- Set specific leadership giving goals.
- Hold special meetings to ask for leadership gifts.
- Ask senior management to be leadership givers.
- Discuss leadership giving at all employee meetings.
- Provide special recognition for leadership givers.

6. Organize Volunteer Activities

- Participate in the Day of Action.
- Tell employees about Volunteer Solutions.
- Encourage employees to join a United Way allocations panel after the campaign.
- Encourage someone from your organization to sit on an Agency Review Team.

7. Make the ASK

- Schedule 30 minute employee meetings to reach all workers.
- Include interactive presentation from a United Way representative.
- Personalize pledge forms with employee names.
- Ask ALL Employees to give.
- Ask all employees to return pledge forms, regardless of whether they donated.
- Follow-up with all employees.
- Ask employees to share personal experiences.

8. Thank, Recognize and Report Results

- Report results to United Way and company employees.
- Post internal thank you messages: signs, articles, and banners.
- Conduct campaign debriefing with United Way and campaign committee.
- Attend United Way Campaign Celebration on December 12, 2011.

 **Your Roadmap:**



1. CEO Support and Involvement

Ask leaders in your company to provide consistent and visible management support for your campaign. Your CEO should be a speaker at major campaign events, such as your company-wide campaign kickoff, leadership meeting and closing event.

Helpful Hints:

- Schedule a time for a United Way staff person to meet with your CEO.
- Work with management to create a plan or campaign leadership succession.
- Send a “Campaign Kickoff” letter from your CEO — this will set the tone for the campaign.
- Ask your CEO and senior management to speak at major campaign events.
- Ask top management to give at the leadership level.
- Ask management to support United Way through a corporate gift.

Sample CEO letter

United Way brings our whole community together to improve peoples lives. United Way makes it possible to do things no one person or company can do alone – from helping kids start school ready to learn, building strong families and providing basic human needs and more.

I invite you to join me in investing in our collective future through the United Way Community Fund. By doing so, you will help far more than one person or program. You will put your dollars to work along with thousands of others in our community, to get real results and help people live better lives. You may also direct part all or a portion of your gift to a specific agency. Either way, your contribution will make a positive difference in our community.

Warmest regards,
CEO

You can find more sample letters, memos and emails as well as other campaign tools in our Online Workplace Campaign Toolkit.

2. Recruit a Campaign Committee

You can't do it alone!

The role of committee members is two-fold: to answer co-workers' questions about United Way and to be the key contact for educating employees and getting pledge cards completed.

1. Build a campaign team with representatives From each department, location, etc. Involve labor representative if applicable.
2. Attend a Campaign Coordinator Workshop
 - **Tuesday, September 1 — 8:00-10:00am**
 - **Tuesday, September 1 — 3:00-5:00pm**
 - **Wednesday, September 7—8:00-10:00am (Hanover Campaign Coordinators)**

**To register email: reams@unitedway-york.org*

3. Keep your United Way representative involved throughout the campaign. He or she is here to help.



3. Set SMART Goals and Track Results

The best campaigns have SMART goals.

Work with your United Way staff to analyze the results of last years campaign and set **SMART** goals.

Specific — Goals should be straightforward and emphasize what you want to happen.

Measurable — If you can't measure it, you can't manage it.

Attainable — Identify goals that are important to you that you can achieve.

Realistic — A goal needs to be realistic, which is not a synonym for easy.

Timely — Set a timeframe which gives you a clear target to work towards.



FIVE STEPS

to calculate your company's investment potential

1 Calculate your company's total \$ potential using one of the these two formulas:

	$\times .01 =$		
Total payroll		<i>Your organization's Total Potential</i>	
or			
	$\times .01 \times$		
Average annual wage		Number of employees	
$=$ <i>Your organization's Total Potential</i>			

2 Identify amount raised in 2008:

3 Percent of total potential achieved:

4 This year's goal:

5 Percent of potential goal:

How to set a workplace campaign goal.

A workplace goal provides an incentive to give and measure success. Every year, each organization should strive to climb higher on the ladder to success. To that end, set a workplace goal to encourage increases in giving.

Get your campaign started.

The most successful Workplace Campaigns have the early and full support of the company's CEO. Prior to beginning your Campaign, meet with your CEO and other top executives within the organization to gain their overall support, review goal setting, obtain their leadership gifts (\$1,000+), and discuss the varied options to Campaign development and implementation.

The worksheet included here can help you to calculate your company's investment potential.

4. Develop a Plan to Share United Way Information

Donors who understand United Way are more eager to get involved and to give.

People will only make a contribution to an organization they know and believe in. The more opportunity your co-workers have to learn about the United Way of York County and the impact of its partner agencies, the more likely they will be to make a gift. As Campaign Coordinator, your efforts can make a difference between a weak or a strong campaign in your company.

Helpful Hints:

- Use United Way-developed materials and messages, or customize your own using United Way tools. These items are available for download in our online toolkit.
- Introduce the campaign by beginning communications at least one week before making the ask or handing out pledge forms.
- Conduct fun, educational rallies and events that get people fired up. The United Way video, games, prizes and success stories spark the kind of caring that leads to the most successful United Way campaigns.
- For group meetings, consider a speaker from a United Way agency. Speakers can tie-in the message of community with real-life examples. Contact your United Way representative to schedule speakers.

SAMPLE EMPLOYEE MEETING AGENDA

Approximate Meeting Length – 30 Minutes	
Welcome & Endorsement <ul style="list-style-type: none">• Thank employees for coming• Stress importance of United Way to the Community• Personally endorse the campaign• Announce corporate gift & Leadership Giving program results	CEO (2-3 minutes)
Company Campaign Overview <ul style="list-style-type: none">• Purpose of meeting• Company's Campaign Goal(s)• Company's Incentives	Campaign Coordinator (2-3 minutes)
Testimonial by Employee <ul style="list-style-type: none">• Report on agency visit OR• Help received from United Way agency OR• Experience as a United Way agency volunteer	Employee Volunteer (2-3 minutes)
Labor Endorsement (if applicable)	Labor Representative (2-3 minutes)
Partner Agency Presentation	Agency Representative (5 minutes)
United Way Overview <ul style="list-style-type: none">• LIVE UNITED Theme• Discuss community needs and how United Way is addressing them	UW Representative (2-3 minutes)
Local Campaign Video	Video (5 minutes)
The Solicitation <ul style="list-style-type: none">• Ask employees to complete forms and turn them in as they leave	Campaign Coordinator (2-3 minutes)
Closing <ul style="list-style-type: none">• Thank employees for coming• Offer to answer questions after meeting	Campaign Coordinator/ Campaign Committee/ UW Representative (2-3 minutes)

4. Conduct a Leadership Giving Campaign

In 2010, 1,103 individuals at 208 companies made a pledge of \$1,000 or more to join the First Capital Club. Leadership giving represents the fastest growth area of the campaign, accounting for 37% of total dollars raised last year. Most organizations with successful leadership programs have utilized the following strategies:

1. Introduce the leadership gift opportunity to employees who have the financial means and are community minded. The program is not just for senior management and professional staff - organizations should consider any individuals approaching the leadership level or individuals earning \$50,000 or more. Also consider inviting employees that donated \$500 or more in the previous year, as they are candidates to step up to the Leadership level as well.
2. Hold a special meeting to explain the leadership giving program; invite a United Way community volunteer or staff member to participate in the presentation.
3. Share the leadership brochure and other campaign information so that prospective contributors have the information they need to evaluate their options. United Way can provide personalized packets for distribution.

Helpful Hints:

- Select a senior manager as the Leadership Giving Chair.
- Set goals for Leadership and Tocqueville giving.
- Consult payroll and develop a prospect list of management and current and past Leadership Givers.
- Ask CEO to host a small, intimate function to educate prospects on the unique benefits of leadership giving — including recognition in the Leadership Giving Booklet, volunteer opportunities and matching gifts.
- Ask CEO to open the meeting with a personal endorsement of Leadership Giving and announce your goals.
- Collect completed pledge forms at the end of the meeting and follow up with individuals who were not in attendance.

5. Organize Volunteer Activities

Volunteer activities help people feel part of a larger community and part of the solution to issues in our community. This can be a way to engage them and forge a long-term relationship.

Volunteer Opportunities

Get involved in Day of Action June 21, 2012!

More than 500 Individuals gave over 2,000 volunteer hours last year during the United Way's Day of Action. Men and women pulled weeds, cleaned cupboards, sorted games, entertained senior citizens and served meals throughout York County.

Encourage co-workers to volunteer with United Way by serving on an Allocations Panel or on an Agency Review Team.

Volunteer Solutions

Find year-round volunteer opportunities for your employees throughout York County:

Visit www.unitedway-york.org and click on "VOLUNTEER".



Day of Action volunteers from SF&Company painting shutters for a home at Penn-Mar Human Services.

Make the ASK!

Make the Ask.

Believe it or not, the #1 reason people say they don't give to United Way is because no one ever asked them to give. Giving is a personal decision, and we must respect the individual's choice whether or not he or she wishes to give, and how much. Here are some hints about HOW to ask others to give and WHAT the best methods of Giving are:

- Distribute personalized campaign pledge forms. Use your committee to help you. PLEASE do NOT simply hand out information with paychecks.
- Ask everyone to turn in a signed pledge form even if he or she chooses not to give. This way, you will know that every person made a choice of whether or not to participate without having to ask him or her directly. Many companies distribute pledge forms in envelopes the employees can fill out and seal, assuring that no one will know if they give, or how much.

United Way keeps contributor information confidential.

United Way respects that giving is a personal decision. Please take steps during your campaign to ensure that every employee feels comfortable in making a decision about giving. For suggestions on how to ask without pressure, please ask your United Way representative for tips.

Avoid Coercive practices

DO

- Offer incentives for turning in a pledge card (even if a zero gift) and participation at rallies.
- Encourage all employees to turn in a pledge form, whether it is filled out or not.

DON'T

- Set a quota of individual giving for executives that is perceived to be tied to promotions.
- Distribute pledge forms without any accompanying educational materials or activities.
- Set a goal of 100 percent giving.
- Send completed pledge forms to the CEO or a supervisor. They need to go to your payroll department for processing, but no one else needs this information.

The Ask

"Our company recognizes how important the United Way is in addressing human service needs in York County; therefore, once a year employees are offered the opportunity to support the community through the Annual Campaign. Please review the enclosed materials and consider making a gift of one hours pay per month. I hope you will join me in supporting this important cause."

Your annual donation to United Way's Community Fund makes a difference.

\$1 per week

Provides a one night shelter stay and clothing needs for a family of 4.

\$3 per week

Provides nine hours of respite care.

\$6 per week

Provides crisis service to victims of domestic violence.

\$10 per week

Provides 5 hours of legal service to low-income York County residents and domestic violence survivors.

\$15 per week

Provides in home health services to four York County residents.

\$20 per week

Provides a year of instruction for an adult to improve literacy and employment skills.

\$30 per week

Provides adult education, job training, and placement services for an economically and socially challenged individual.

\$55 per week

Provides all of the above!

8. Thank, Recognize, and Report Results

Report Results.

Provide copies of the United Way Campaign report and the pledge forms to United Way of York County and your payroll department.

Provide copies of the incentive entry forms to the United Way office by noon on December 1, 2011.

Provide results to your CEO and co-workers. Discuss with them what worked and what didn't. What changes need to be made for next year?

Thank and Recognize.

Helpful Hints:

- Post photos of employees participating in campaign events on bulletin boards.
- Include a special message in payroll stuffers.
- Put thank you message in company newsletter to let people know how well you did.
- Announce campaign results through newsletters, e-mail, voicemail or a memo.
- Sponsor a breakfast, luncheon, ice cream sundae bar or reception to thank participants
- Distribute company or United Way pens, mugs, certificates, awards, buttons or notepads to volunteers and donors.
- Send a personalized thank you letter.
- Wrap up your campaign in a meaningful, creative way that falls within your budgetary means. A recognition event can be as simple as an all employee meeting or could be as elaborate as a hosted lunch or dinner.



SAMPLE THANK YOU EMAIL

To:
From:
RE: Thank you

Thank you again for giving to United Way this year. At the very heart of United Way's mission is the idea that nothing is as powerful as a community working together to do the work it takes all of us to do. From ensuring that children start school ready to learn, to helping families become self-sufficient and meeting basic human needs, we're doing what matters.

With your support, the issues we're addressing today won't be a concern tomorrow. Thank you again for joining the cause to make York County a safer and stronger community – for all of us.

Sincerely,

Special Events = FUN!

A campaign that is fresh and fun makes your job more enjoyable and creates more awareness among your co-workers. We have included a variety of ideas and events to help you make your employee campaign more exciting and effective. It also provides an additional opportunity to raise money for United Way.

Steps for a successful Special Event:

1. Choose the type of event you would like to hold.
2. Gain support from your organization's management.
3. Check calendar availability of top management to ensure their participation.
4. Select a date that won't conflict with other company events.
5. Name a general chairperson (person in charge of overseeing event).
6. Recruit volunteers to help out.
7. Publicize the event
8. Thank those who help you

☺ **Bagging it**

Designate a day as — “Brown Bag Day”
Encourage staff to bring their lunches on that day and donate the money that they would ordinarily spend on going out to lunch.

☺ **Employee Cookbook**

Employees submit recipes for this project - -
Ask employees to submit their favorite recipe to compile the cookbook. Organize a luncheon to kickoff your campaign where all recipes can be sampled. Sell the cookbook during the luncheon—to employees, vendors, customers, etc.

☺ **Change Wars**

Place a fishbowl at the cafeteria next to the vending machines so employees can easily throw in any spare change they have in their pockets or purse.

☺ **Ugly Sweater/Tie/Hat Contest**

Ask employees to wear their ugliest article of clothing to work. Charge \$10 for each person to enter the contest and \$1 for each vote.

☺ **Executive Car Wash**

Employees donate \$10 to have their car washed by organization VIPs. There is an extra charge for Polaroid photos of the boss washing their cars.

☺ **United Way Parking Spot**

Designate the parking spot(s) closest to the door for United Way. Offer the spot(s) to employees as an incentive to contribute during to the campaign.

☺ **Jeans Day**

Your organization can sell jeans day stickers for United Way once per month throughout the entire year. Employees get two jeans day stickers with their United Way pledge, and the opportunity to purchase 10 more for \$25. This money then is donated to United Way.

Strategies to Grow Your Campaign

The United Way campaign is a community-wide effort, everyone can do their part to **LIVE UNITED**. Consider using one or more of the following strategies to help you increase participation in your workplace campaign. We all have different capacities to give, but remember, whether you give \$5 or \$5 per week, it's about participation and a community united to advance the common good.

Increase Participation:

- Make sure that 100% of your employees are asked to make a contribution and receive a pledge form.
- Personalize pledge forms.
- Provide compelling message (stories, video, speaker, etc) to share the success of United Way.
- Encourage 100% of employees to make a pledging decision and return a pledge form.
- Provide a healthy snack to everyone who turns in a pledge form — \$ gift or not.
- Expose employees to agencies — speakers, tours, volunteer opportunities.
- Ask for a testimonial from an employee who has received services from a United Way agency.
- Have campaign appeal come from someone other than senior leader – from a co-worker instead.
- Award a jeans day sticker when people make a payroll deduction gift.
- Provide special incentives or recognition for first-time donors.
- Create competition between departments for participation.
- Have early bird raffle drawing for pledge cards turned in on the first day of campaign.
- Send a series of emails that remind employees of the importance of United Way.
- Provide more year round volunteer opportunities for employees.

Increase Per Capita and Average Gift:

- Give the employees extra time off for increasing their gift by “X” percent.
- Hold a leadership giving campaign.
- Stress the ease of payroll deduction.
- Ask employees to give \$1 more a week.
- Increase the company goal.

Incentives:

- Time Off
- Jeans Day Stickers
- Breakfast cooked my mgmt.
- Reserved parking
- Gift cards
- Tickets to games / shows / movies
- Company logo items
- Food donated by employees
- Dinner for two
- Lunch with CEO
- Car wash



Incentives for your campaign
Give \$3 a week for a chance to win!



For the first time **EVER**, United Way of York County donors who make a contribution of \$156 per year, or \$3 per week are eligible to enter the Campaign Prize Drawing for a chance to win one of **TWO GRAND PRIZES, and more!**

GRAND PRIZE: 2012 Harley-Davidson® Motorcycle, donated by H-D Motor Company

Second Prize: \$1,500 Giant Gift Cards, donated by Giant Food Stores, Inc.

Third Prize: iPad 2 Bundle with a value of \$1,000, donated by DOCEO OFFIC SOLUTIONS

Forth Prize: \$1,000 Bon-Ton Shopping Spree, donated by The Bon-Ton Stores, Inc.

Campaign Timeline

Use this timeline to help you start planning your campaign calendar. The sooner you get started, the easier your job will be. United Way staff is here to assist in any way.

2011 United Way Campaign

Meet with your United Way representative to set campaign start (kickoff) date.
At least 4 - 6 weeks in advance.

Attend a Campaign Coordinator Workshop.
To R.S.V.P. contact your United Way representative or call 717-843-0957

Set dollar, participation and awareness goals. Select and train advocates.
At least 2 - 3 weeks in advance.

Send a letter to employees from CEO endorsing United Way.
At least 1 week in advance. Sample letter included in this guide.

Begin sharing information to educate your employees.
At least 1 week in advance. Use materials provided by United Way or download tools at www.unitedway-york.org.

Campaign Kickoff: September 10, 2010 at 7:30 a.m. in the White Rose Room at the York Fairgrounds. All campaign supporters are welcome.

Send follow-up emails periodically during the campaign with facts about United Way to keep up the enthusiasm.
Hand out personalized pledge forms.

Give employees hands-on opportunities to learn more, by using United Way speakers and taking an agency tour.
Ask your United Way representative for help.

Send reminders on a weekly basis updating staff on progress toward goal. Remind them that the campaign is closing and pledges need to be submitted.
3 days before campaign closes.

Collect pledge forms and prepare report. Submit pledge forms or data to your payroll department and report envelope to your United Way representative.
Turn in a copy of each pledge form to the United Way office by noon on December 1, 2010 to qualify for the campaign drawing.

Announce the end of your campaign and publicize your results.

Thank employees with a victory party, email, etc.

Attend Campaign Victory Celebration: December 12, 2011, 5:00 p.m. at The Yorktowne Hotel.



MISSION STATEMENT

To Improve people's lives by building a strong community through cultivating financial generosity, volunteerism and civic engagement.

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www.unitedway-york.org

HOW TO LIVE UNITED:
JOIN HANDS. OPEN YOUR HEART.
INSPIRE HOPE. CREATE A BETTER TOMORROW.
THINK OF WE BEFORE ME.