

United Way Campaign

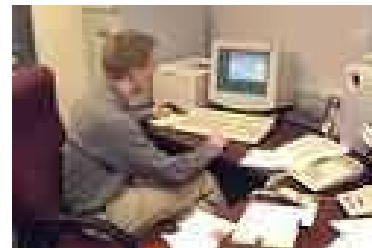
Campaign Coordinator Resource Guide

Our mission at United Way of Greater Duluth is to lead a united effort to strengthen our community by mobilizing resources to improve people's lives.

Thanks to the support of generous businesses and individuals like you, United Way is positively impacting the lives of thousands in our community.

By investing in the basic building blocks for a good life – Education, Income and Health – along with essential services that provide a critical hand-up to those who need it, United Way of Greater Duluth is inspiring hope and creating opportunities for a better tomorrow.

And we couldn't do it without you.





Message from United Way of Greater Duluth

Dear Employee Campaign Coordinators,

Welcome to the United Way Campaign!

United Way of Greater Duluth is committed to improving lives and building a stronger community. Your role as campaign coordinator truly embodies this spirit. Thank you for accepting this very important assignment.

As a campaign coordinator, you will play a vital role in making this year's fundraising campaign a success. This handbook has been designed to help make your task easier. In it you will find quick and useful reference tools and techniques to maximize your campaign's success. These best practices have been proven to enhance campaigns across the country. I am confident you will find them useful.

A successful campaign will enable United Way to make a lasting impact on the quality of life in our region by working to address the most serious health and human service issues.

Thank you again for your help. We couldn't do this without you!

Sincerely,

A handwritten signature in cursive script that reads "Bekki Babineau".

Bekki Babineau
Campaign Director, United Way of Greater Duluth

P.S. Don't forget that **we have Campaign Executives available** to work with you on your workplace campaign. If at any time you have questions or need assistance, please call United Way of Greater Duluth at 726-4770. We're here to help and have lots of resources available to ensure success!

Working to Create Lasting Change

Balancing Community Contributions and Partner Designations

At United Way of Greater Duluth, we are in the business of changing lives.

We believe that the **Community Care** Investment Option is your single greatest opportunity for improving the quality of life in our community. However, we will not discourage someone if they are committed to designating to a specific organization or target area. What we do want is for each contributor to know why we think an unrestricted gift is the best option.

- United Way is not a pass-through organization, which simply receives contributions from Point A and delivers them to Point B. United Way gathers resources – money, time, knowledge, research, and more – and uses them to address community issues. Our agency partners fill a vital role in this process, but making a difference requires more than their services alone.
- United Way leverages our relationships with the nonprofit sector, government entities, corporations and others (including contributors like you) to tackle problems from all sides. Thus, to have each donation pack real power, giving to United Way through Community Care is the best way to achieve these goals.
- A major advantage of giving to United Way is that each gift assures that a variety of programs and services receive funding to address current and emerging community needs. We are all partners in making a difference in what matters most – improving lives and building stronger communities – and we appreciate your support.

While we believe that an unrestricted Community Care Investment provides you the greatest return on your investment, we recognize that choice matters and offer the following giving options:

1. **Community Care Investment** – Your unrestricted gift goes where it's needed most.
2. **Investment Areas** – Contribution is directed to programs in one of United Way's investment areas:
 - a) Fostering Successful Children & Youth
 - b) Improving People's Health
 - c) Promoting Financial Stability & Independence
 - d) Ensuring a Strong Network of Basic Human Services
3. **Direct Designation** – Contributions are directed to one or more agency's program(s) and/or another United Way. *Contributions may also be directed away from one or more agencies if desired.*

Get off to a strong start

There are essentially three elements of a campaign – the employee drive, the corporate gift and special events – and the most successful campaigns employ all three.

Keep it short – build momentum quickly, kick-off and conduct your campaign, and wrap it up. Your campaign should last about a week, with an additional week or two of pre-campaign promotions, and followed by a week afterwards to say “thank you” to your colleagues and wrap up reporting. Use the following checklist to help you with your planning.

Campaign Checklist

Pre-Campaign

- Review last year’s results and plan this year’s campaign with your United Way representative
 - How much was raised last year? \$ _____
 - How many employees are in your organization? _____
 - How many employees participated last year? _____
 - What was the average employee gift? _____
 - How many contributors used payroll deduction? _____
- Confirm CEO support and union support (if applicable) and how they will be involved
- Form a campaign committee and strive for total involvement
- Recruit someone to help with special events
- Plan your kick-off event
- Schedule United Way speakers, confirm campaign material quantities, personalize pledge forms, plan and schedule special events/activities
- Get to know United Way of Greater Duluth
- Visit our website at www.unitedwayduluth.org, review campaign materials or call Bekki Babineau at 726-4771
- Set your campaign goal(s)
 - Employee
 - Corporate
 - Special Events
- Secure a corporate gift commitment (if applicable)
- Finalize your campaign plan and calendar of events
- Publicize the campaign (at least two weeks prior to kick-off event)
- Send letters endorsing the campaign from your CEO and other top company leaders

Campaign

- ___ Kick off your campaign
- ___ Ask everyone to contribute, one-on-one and/or in group meetings
- ___ Send a retiree solicitation
- ___ Conduct special events
- ___ Follow-up, especially with prior-year donors to ensure that all pledges are received
- ___ Wrap up the campaign, complete contacts and account for all pledge forms

Post-Campaign

- ___ Tabulate the results and submit to United Way
- ___ Give payroll deduction forms to your payroll department
- ___ Announce your campaign results
- ___ Conduct a “thank you” program for all contributors and campaign volunteers
- ___ Conduct a campaign evaluation & develop a written summary for next year
- ___ Meet with key leaders to ensure a New Hire Program is in place
Call UWGD for information related to a New Hire Program (726-4770)

The Successful Campaign Meeting

The following outline can be used to plan an effective campaign meeting:

| <u>Time</u> | <u>Activity</u> |
|---------------------|--|
| As employees arrive | Distribute personalized pledge cards and brochures |
| 3 minutes | Opening remarks/welcome from the Campaign Coordinator |
| 3 minutes | CEO and appropriate leader(s) provide a statement of company support, establish corporate commitment to United Way and encourage participation throughout the organization (and discuss corporate match if applicable) |
| 5 minutes | United Way speaker presents the case for giving. This educates the audience about community needs and offers them a way to participate |
| 5 minutes | Show the campaign video to raise audience awareness and encourage employees to support their community by giving to United Way |
| 4 minutes | Campaign coordinator explains the various giving options, including the benefits of payroll deduction. Campaign events should be announced along with incentives |
| 2 minutes | Close with a heartfelt thank you to the audience. Collect pledge cards and distribute any thank you items as employees exit |
| After the meeting | Remember to follow-up with absent or part-time employees. Also, consider strategies to include retired employees in your campaign |

Tips for Leading an Effective Campaign

There are 11 benchmark techniques for running an effective United Way campaign. Implementing these techniques can dramatically impact your campaign results. The more techniques that are implemented, the higher your per capita gift will be (the total employee contributions / total # of employees). The research shows that:

| | |
|----------------------------------|--------------------|
| When 0 to 3 techniques are used | + \$77/per capita |
| When 4 to 6 techniques are used | + \$85/percapita |
| When 7 to 11 techniques are used | + \$115/per capita |

Proven benchmark techniques

1. Appoint a campaign chairperson (Congratulations you have hit one bench mark!).
2. Utilize local United Way staff resources.
3. Establish a steering committee, inclusive of both management & labor (if applicable).
4. Review past campaigns, set goals and track results.
5. Recruit department coordinators and labor representatives (if applicable).
6. Conduct ongoing briefings with your CEO.
7. Promote the value of a corporate gift match program as an incentive to employee giving.
8. Encourage leadership giving – gifts of \$1,000 or more (easy to do via payroll deduction).
9. Increase your number of campaign volunteers (many hands make light work!).
10. Educate yourself and your committee so you can conduct an effective campaign.
11. Organize fundraising activities that encourage participation, promote team-building and raise funds at the same time!

Hold a kickoff rally

Use this event to generate enthusiasm and support for the campaign. Pick a theme for the kickoff and the entire campaign. Educate your peers at the rally by showing the United Way video, inviting United Way speakers and service recipients to speak and having management and labor representatives endorse the campaign. Let everyone know about your company campaign goals.

Promoting your campaign matters

To achieve maximum participation in your campaign, publicize your efforts in as many ways as possible. Make sure to utilize communication methods that your colleagues use every day.

- Employee websites, intranets and publications
- External publications and media connections
- Special displays, posters and banners in the workplace
- Meetings
- Inter-office mail
- E-mails
- Telephone calls and voice mail messages

To use your resources effectively, list the communication tools you have available and then decide what message is appropriate for each medium.

The Importance of Asking

According to United Way research, the primary reason people don't contribute to the annual campaign is because they are not asked. Put simply – there is no task more important than asking people to give.

TIP: Asking in person truly makes a difference. The two most successful ways to do so are the one-to-one, individual requests and the group request. And please be sure to ***ask everyone!***

The One-to-One Request

You should begin making one-to-one requests as soon as possible. Extend personal requests to as many people in the organization as you can. Then ask the whole group at the campaign kickoff meeting. Continue reaching out until the entire staff has been asked to contribute.

The approach

Each employee is asked by a fellow worker (the campaign volunteer) to contribute. This allows contributors time to ask questions and hear firsthand how United Way improves lives and communities through a network of agencies and programs across the region. United Way has plenty of information and resources available for those who are “making-the-ask” so they can be well prepared to handle questions.

Advantages of one-to-one requests

- The message can be tailored to individual employees and/or employee interests.
- The request for a contribution can be made directly and individual questions can be addressed.
- Campaign leaders can learn why a nonparticipating employee doesn't contribute and then address any concerns related to that decision.

Tips for one-to-one requests

- Recruit key people from each department. Try to get one volunteer for every 10-15 employees.
- Try to use volunteers. They tend to be more effective than those who are chosen or asked.
- If you are able, plan agency tours, bring in agency speakers and use other tools to inform volunteers about United Way.

The Group Request

If you're planning group requests, make sure that managers and employees are told before attending a meeting that they'll be asked to contribute to United Way.

The approach

After hearing the United Way story and seeing the campaign video, ask everyone to make their pledge using the card provided by United Way or your payroll department. Collect pledge cards as people are leaving the meeting and give one copy to your payroll department and one copy to United Way.

TIP: Ask everyone to return a pledge card before leaving the meeting or by a set date – *even if they choose not to contribute*. This will make your job easier by not having to track down outstanding donations or pledge cards and you will know that everyone has been given an opportunity to participate. Offering an incentive (i.e. drawing for a prize) to encourage the return of pledge forms is a great strategy that can effectively expedite the pledge-form collection process.

Tips for a successful group meeting

- Experience shows that the best results are achieved when meetings are scheduled at the start of a workday and accommodate between 15 and 50 participants.
- Greet everyone as they enter and hand out *personalized* pledge cards. Printed labels work great for personalizing and add a personal touch to the request for support.
- Keep track of collected cards so that you can easily identify those that have not been returned. Follow-up with those employees who did not attend the meeting and/or did not return their pledge card.
- United Way strongly recommends that companies utilize trained **United Way Campaign Executives or agency speakers** to address co-workers and answer their questions.

Encourage Leadership Giving

The Sieur du Lhut Leadership Giving program recognizes United Way contributors who give \$1,000 or more annually. The program consists of four donor recognition levels: **Friends Order** (individuals or couples giving \$1,000 to 1,999 annually), **Explorer Order** (individuals or couples giving \$2,000 to 3,499 annually), **Visionary Order** (individuals or couples giving \$3,500 – 4,999 annually) and the **Daniel Greysolon Order** (individuals or couples giving \$5,000 and above annually).

The **Benefits of Leadership Giving** include recognition in printed materials (donors can choose to remain anonymous), a personal thank-you letter and invitations to members-only events. For more information about United Way of Greater Duluth's Leadership Giving Program, contact Paula Reed at 726-4790.

Available Campaign Materials

Print Materials

Posters, brochures, pledge forms, goal thermometers and other printed materials are just some of the items United Way offers to help you promote and implement your campaign.

Promotional Items

Pins, balloons, coin canisters and casual day stickers are available from United Way at no cost. Additional items can be purchased at the United Way store by going to www.unitedwaystore.com. You may also contact United Way at 726-4770 to receive a copy of the catalog.

2011-12 Campaign Video

Our locally-produced campaign video tells the United Way story effectively in approximately 5 minutes. The video is a great way to educate large groups of your employees about the lives that are improved because of their United Way contributions. Show it at campaign kickoffs, rallies and other events to support your overall fundraising effort. To request a copy of the video, talk with your United Way Campaign Executive or call United Way at 726-4770.

Use Speakers and Tours

Campaign Executives

Individuals from local companies work with United Way during the campaign and are available to support your company's efforts in a variety of ways. From brainstorming strategies and delivering materials, to facilitating campaign meetings and speaking about the benefits of giving to United Way, these individuals will positively impact your campaign efforts and help "lighten your load." Call United Way at 726-4770 to find out who your Campaign Executive is today!

United Way Agency Speakers Bureau

Inviting a representative from one of United Way's agency partners to speak is a great way for people to learn how their contributions actively help others throughout the community. Speakers are available to address audiences on a variety of topics. Using the Speaker's Bureau also enables you to attach a face to your campaign. Ask your United Way Campaign Executive about inviting an agency speaker to speak at an upcoming meeting or activity.

United Way Agency Tours

Touring a United Way agency gives employees an up-close look at how their contributions change lives. It can be a powerful way to encourage anyone to see the advantage of contributing to United Way. Tours can be arranged by your United Way Campaign Executive.

Remember to recognize those donors!

Recognition is important! So is saying thank you, often.

United Way can provide your organization with recognition pins to help you thank your co-workers. The United Way Store catalog also features hundreds of items that can be used to recognize key volunteers, campaign coordinators, contributors – basically everyone who had a hand in making your campaign a success. Please contact United Way of Greater Duluth for ordering information.

Use the following methods to recognize and thank supporters:

- Letters
Thank you letters or e-mails can come from your CEO, the various campaign committee members, the local president of the employee union or a child or adult who has benefited from a United Way initiative or agency partner. The more personalized the correspondence, the better it will be received. Also, remember the way in which a letter is distributed can be as important as its contents – try to deliver them personally.
- Gifts
In addition to the items featured in the United Way of America catalog, don't forget about novelty or gift items bearing your company's logo that you may already have in-house. Contributors appreciate certificates and other items from local businesses as well. Half-days off, gift certificates to local restaurants, prime parking spots, key chains, coffee mugs, pins with your campaign theme or "credits" for any goods or services produced or provided by your organization have all been effectively used in the past.
- Awards
Recognition of groups, departments and individuals is imperative, and can be accomplished a number of ways. Certificates, plaques and desk sets are just some of the methods you can use to recognize outstanding efforts.

- Events
Perhaps no other method of thanks is more popular than a creative and sincere special event to wrap up a successful campaign. Such events show employees just how much they have accomplished and how much their support is appreciated. Consider having a thank-you breakfast, lunch or dinner, a barbeque or a picnic, an ice cream social or a victory rally.
- Public thanks
When employees become involved in the campaign effort, it's important to share the final results with them and recognize their respective roles. This can be done by placing a banner in a heavily traveled area, placing United Way posters throughout your facility, saying thanks on your computer bulletin board via e-mail or via voicemail, and publishing a special thank you edition of your internal newsletter.

And again – thank YOU for making a difference in what matters!

Make giving fun...and improve results!

Whether you implement a fun new approach each year or enjoy the familiarity of a consistent campaign, remember one thing: Have fun! We've added some great examples in the following pages to help kick-start your creativity – but there are limitless ways to make your campaign more fun. Stumped? Just contact the United Way office or your Campaign Executive for more great ideas!

Contact Us Anytime!

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Campaign Director
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United Way is in the business of creating lasting community change and building stronger communities by looking at the underlying causes of human and social service problems. Whether it's tackling homelessness, providing childcare or empowering the under and uninsured with needed health services, United Way collaborates with scores of community partners to identify and address critical issues.

It's not how many programs or initiatives we undertake or simply how many people we involve in the process. What matters are the health, well-being and strength of our children, our families and the communities we enrich.

It's easy to simply parade numbers and statistics, but if what we do does not make a lasting difference, the numbers mean nothing.

We prefer to talk about the lives they change.

The communities they shape.

The results.

For our region, our community, our families –

That's what matters.

LIVE UNITED™