

United Way of Portage County

**EMPLOYEE CAMPAIGN
COORDINATOR TRAINING**



**United Way
of Portage County**

United Way's Fast Facts

United Way of Portage County is a provider of funding to 39 programs within 17 non-profit agencies in Portage County. The agencies utilize their United Way funding to serve their client's needs through their many valuable programs. Therefore, when you give to the United Way, you are helping people with needs daily within your community.

One of the advantages of giving to the United Way is that you can designate your charitable contribution to a program, agency of choice, or to the community in which you live. United Way is all about donor choice and working to meet the needs of your community.

The undesignated dollars are allocated where needed by a group of community volunteers. Our citizen's review process ensures that funding is getting distributed to our agency's programs that in turn meet the immediate needs of the community year to year.

Once your dollars have been allocated, they will impact these five areas of focus: responding to crisis, helping children & youth, helping adults, helping families, and health & well-being issues. These are United Way's five impact areas.

In addition, the United Way of Portage County allows people to contribute their gift to any 501c3 non-profit organization. Through the United Way, you have the convenience of making your charitable contribution through your employer's payroll deduction. As the United Way receives your contributions from your employer, it then sends them to the assigned agencies and other United Ways.

United Way of Portage County runs the 211 call center. Through *211 Portage*, you are connected to over 800 community services in Portage County. When you call us we are here to help you!

211 Portage received over 12,000 calls last year from residents of Portage County requesting information and referral services. We are meeting needs daily!



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10 Easy Steps To Running Your United Way Campaign!!!

1. Set A Goal by Analyzing Your Past Giving

- a. Review your company's fact sheet.
- b. % participation.
- c. Average gift.
- d. Corporate giving.
- e. Review number of \$1,000 donors (Rainbow Society).
- f. Consider your areas for improvement.
- g. Use your incentives to affect these areas.

2. Get CEO Endorsement

- a. Their personal gift.
- b. A corporate gift (possible \$ for \$ match).
- c. Request a budget for campaign activities & incentives.
- d. Request they be present at all UW activities.
- e. Start activity with CEO commenting on how important UW is within the community.

- f. Send the message, “We support UW as an organization. The company gives, I give, and we invite you to do the same.”
- g. Make sure payroll deduction is available.

3. Recruit and Train a Team

- a. Must be contributors and UW advocates!
- b. Someone who has been helped by the UW.
- c. Someone who has volunteered on an allocation panel.
- d. Recruit a chair and a co-chair in order to rotate responsibilities year to year.
- e. Represent all departments; management, labor, production, salary, hourly, etc.
- f. Recruit well-liked trusted individuals who can encourage giving.
- g. Invite United Way to conduct a personalized ECC training within your organization.
- h. Review UW’s fast facts to become familiar with their funding process.

4. Plan Your Campaign

- a. Set a goal (by department, too).
- b. Hang a thermometer where everyone can see.
- c. Personalize your pledge cards.
- d. Determine a theme, if desired.
- e. Set your dates/timeline; the shorter the better!
- f. Request materials from UW.
- g. Create competitions between departments.
- h. Promote payroll deduction.

- i. Consider a special event (ideas attached).
- j. Create your strategy to increase giving; focus on new donors, increasing prior donors, and leadership donors.

5. Educate Employees

- a. Survey employees to learn their knowledge level on the United Way and community needs.
- b. Community review process is key to UW.
- c. Use UW campaign materials.
- d. Provide agency tours prior to campaign.
- e. Get involved with UW's Day of Caring.
- f. Invite a UW speaker in to explain community needs.
- g. Show the UW video.
- h. Find an employee that has been served by a UW agency to share their story.
- i. 211 is the number to call when in need!
- j. Review UW's Fast Facts.
- k. Ways to give: payroll deduction, cash gift, billed at home, and stock gifts (eliminate the capital gains tax).

6. Offer Incentives For Giving

- a. Goodies to those who give for the 1st time (increases % participation).
- b. Goodies to those who increase over last year (increases average giving).
- c. Those who step up to \$1,000 for the 1st time.
- d. Those who return pledge cards that day.
- e. Those who give via payroll deduction.

- f. If company or manager matches, employees give more!
- g. Gas card, day off is #1 (more ideas attached).

7. Make The Ask

- a. Explain incentives before asking.
- b. Group presentation the best (sample agenda attached).
- c. Solicit during a staff mtg. or company event.
- d. One-on-one solicitation.
- e. Solicit through a letter signed by CEO.
- f. Solicit through an e-mail signed/sent by CEO.
- g. Solicit management team/those with potential of giving \$1,000 & above separately with a "leadership giving campaign."
- h. Solicit all shifts and all departments.
- i. Solicit retirees.
- j. Solicit new hires throughout the year.
- k. Follow up with those not in attendance at Kick-Off.
- l. Even request non-donors to return pledge card.
- m. 100% solicitation!!!

8. Run a Leadership Giving Campaign

- a. This is a separate campaign solicitation asking your CEO, management team, officers, board members, etc. for a leadership gift (\$1,000 & above).
- b. Assign a different coordinator to run this campaign, the person making this request should be a leadership giver.

- c. Target donors currently giving \$500 and above and those making larger salaries.
- d. Donors can combine their gifts with their spouses to make a \$1,000 gift.
- e. Make a list of their names and follow-up individually.
- f. Offer larger/more expensive incentives for this group.
- g. It requires only \$38.50/pay over 26 pays.
- h. Sample letter is attached.

9. Thank and Recognize Your Donors!

- a. Have a breakfast/lunch for all who donated after the campaign. Pass out gift awards at this event.
- b. Have the CEO send a personal thank you note to all who gave.
- c. List donor's name in your newsletter or on a bulletin board.
- d. CEO to recognize campaign committee.

10. Report back to the United Way.

- a. Evaluate and measure the success of your campaign.
- b. Provide us with your current number of employees.
- c. Make sure your pledge cards and cash are placed within our campaign envelope and filled out.
- d. Make sure the corporate gift or corporate pledge card is signed and included in the envelope.
- e. Inform us if any of your large donors who have retired.
- f. Let us know what worked and did not work!

Remember.....

- The number one reason people do not give is because they were not asked!
- 90% of your time should be in planning your campaign and 10% spent running it.
- Follow up with your non-donors.
- Involve UW with you planning.
- Thank your donors!
- Have Fun!



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Special Events, Incentives & Theme Ideas



**It makes the present seem more special!*

Think of the payroll deduction campaign as the present, and the special events as the wrapping paper. Special events are not meant to generate the majority of your dollars raised. And we understand not everyone is able to or wants to give. But special events are great ways to involve your non-donors and allow them the opportunity to feel they have participated in your efforts to support the community.

Special events are also wonderful ways to market, communicate, and educate your employees on the importance of the United Way. They are also opportunities to generate enthusiasm, fun, and excitement in the workplace! They are a great way to foster healthy competitiveness among different departments and giving categories. Be sure to invite the United Way to your year-round events. We want to be there to take photos and share your success with other organizations on our web site.

I. Special Event Ideas:

- Pie throwing Contest
- Baby/Pet Picture Match
- Bingo
- Casino Day
- Children's Drawing Contest
- Karaoke Party
- Kiss the Pig/Donkey Contest
- Pumpkin Carving/Decorating Contest
- Scavenger Hunt
- Trivial Pursuit/Chess/Scrabble Contest
- Ugly Tie or Ugly Earring Contest
- Auction
- Guess on the total of coins in a jar
- Inside Golf course
- Raffle a gift
- Bake Sale

II. Incentives for new givers, increased givers, or those returning pledge cards early:

Day off work
Gas cards
Movie tickets
Gift certificates/Target/Restaurants
Lunch with the boss
Dress down day
Sleep/leave early in pass

Airline ticket thru corp. travel dept.
Premium parking spot for month/year
Tickets to sporting/musical events
Free Hotel Stay
Company merchandise/gifts from vendors
Free oil changes

III. Theme Ideas:

Live United
Giving isn't Expensive . . . it's Priceless
Shoot for the Goal
Your Help is their Hope
All Stars for United Way
Reach for the Stars
Wild West Theme
Recipe for Caring
Together We Make Miracles
Write a Happy Ending
Caring is Sharing
Give Hope a Chance
Open your Heart
Capture the Spirit
Touch a Life
Straight from the Heart
Make a Stand, Lend a Hand
Lift Someone's Spirit
Team up with United Way
Caring Works Wonders

Sample Solicitation Letter

From CEO to Employees

Date

Name

At (Company name) we think it's really important for us to do our part to help make Portage County the very best it can be. That's why (Company name) is a proud supporter of the annual United Way workplace campaign.

Right here in Portage County, United Way is changing the way – from quick fixes to real, lasting change. It's not enough to just treat the symptoms of serious problems like hunger and unemployment. United Way goes deeper, to get at the heart of these problems. Their goal – and our goal – is to make long-lasting changes in the community that prevent problems from happening in the first place.

As an employee of (Company name), you can make that goal a reality – all with the convenience of a payroll deduction. And whether you give a little or a lot, your United Way contribution goes to work bringing lasting change, right here in Portage County.

To learn more about United Way and how we can help make Portage County a better place for all of us, visit the website at www.uwportage.org.

I invite you to join us. Because together, united, we matter more than we know.

Thank you!

CEO Signature

Sample Solicitation Letter

Leadership Giving Letter (Rainbow Society \$1,000 & above)

Date

Name

As you know, we are currently involved in a fund raising campaign for the United Way of Portage County. Company has long been committed to Portage County, as the community that gives us our livelihood. I am personally proud to be a Rainbow Society member along with over 140 other generous supporters.

I would like to ask you to join me in making your 2008 pledge a Rainbow Society level gift of \$1,000 or more. For just \$3.00 per day or \$19 per week, you can make lasting difference in what matters in our community. The United Way is the only charitable organization available to our community that offers a holistic approach in answering the most pressing needs of the community. The United Way depends on the spirit and good will of people like us to ensure people and resources are brought together to find solutions to critical issues facing Portage County.

Please consider my request for a gift of \$1,000 or more to the United Way of Portage County. Return the enclosed pledge form to Name by Date. Thank you so much for all you do to make our community and company a better place.

Very truly yours,

Leader Name

Leader Title

Sample Solicitation Letter

Retiree

Date

Name

As you know, employees of (company name) have always joined forces supporting the United Way to help meet the needs of our community. Together, we've made a difference in the lives of many people. We want to thank you for your past participation. Our United Way campaign is about to begin, and we are inviting all active and retired members of our (Company Name) family to join us in supporting United Way.

Right here in Portage County, United Way is changing the way – from quick fixes to real, lasting change. Because it's not enough to just treat the symptoms of serious problems like hunger and unemployment. United Way goes deeper, to get at the heart of these problems. Their goal – and our goal – is to make long-lasting changes in the community that prevent problems from happening in the first place.

As a retiree of (Company name), you can make that goal a reality. And whether you give a little or a lot, your United Way contribution goes to work bringing lasting change, right here in Portage County.

Just fill out the enclosed pledge form and return it with your check payable to United Way of Portage County.

I invite you to join us. Because together, united, we matter more than we know.

Thank you for investing in what matters.

Sample CEO Thank You Letter

Dear Employees:

Once again, you've helped make our United Way of Portage County fundraising campaign a success. We've shown that as individuals and as a company, we care about making our community a better place to live, work and raise a family.

You can be assured that teams of experienced, dedicated volunteers are investing your contributions, and others, in programs that have a measurable impact on the lives of people right here in Portage County.

United Way of Portage County also leads or participates in a number of programs and initiatives such as _____; and the _____.

So, on behalf of (Company name)'s United Way Campaign team and everyone in the community, thank you for doing your part to make lasting changes right here in Portage County. That's what matters.

Sincerely,

Sample 30 minute United Way Kick-Off Agenda

The campaign kick-off event should not be optional and can be added on to another activity that includes your employees; like a staff meeting, company picnic, etc. If food is offered, folks are sure to attend and leave feeling excited about giving!

Welcome

Announce Theme

Distribute materials/personalized pledge cards **Coordinator**

Corporate Gift & Company Involvement

I give, the company gives, and we hope you give too! **CEO**

Announce Goal & Incentives

(how it can be reached; if 25 new donors gave \$1/wk, etc)

Campaign Dates

Recognize Campaign Planning Team **Coordinator**

United Way Representative

(explains how the dollars are used) **United Way**

Personal Testimony from an employee

Staff Member

Q & A

Collect Pledge Cards **Coordinator**



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Notes



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