



INTERNAL COORDINATORS GUIDE TO A GREAT CAMPAIGN



United Way of the Brazos Valley
www.UWBV.org



YOU ARE MAKING AN IMPACT IN OUR COMMUNITY

The United Way Community Campaign is about bringing people together to address our community's most important issues. As a United Way Campaign Internal Coordinator, you stand alongside hundreds of other volunteers who are dedicated to making a measurable impact in the lives of the people in our community.

Due to the success of the Workplace Campaign, the generosity of our donors, and the dedication of our volunteers, United Way invests in Community Impact Grants to 20 partner agencies improving lives in the Brazos Valley and in Investment Initiatives, collaborative programs with targeted solution like 2-1-1 Texas, VolunteerBrazosValley.org, Youth Leadership Cabinet and Financial Stability Innovations.

This handbook focuses on the role and responsibilities of a Workplace Campaign Internal Coordinator. It is designed to lead you step-by-step through a United Way Campaign while offering tools, tips, and best practices to ensure success. While this book offers a good overview of the United Way Campaign, it does not answer every question. More resources are available through our online toolkit and your local United Way representative.

Thank you for volunteering to be a part of the annual United Way Community Campaign.

By giving your time and talent, and spreading the word, you are helping to advance the common good. Together, united, everyone can inspire hope and create opportunities for a better tomorrow.

That's what it means to **LIVE UNITED**.



YOUR ROLE AS AN INTERNAL COORDINATOR

OBJECTIVE:

Plan and implement a fun, informative and successful United Way campaign and create year-round opportunities for United Way of the Brazos Valley to connect your employees to the community.



RESPONSIBILITIES:

- Lead an exciting and successful campaign
- Develop effective strategies to help educate and involve employees
- Execute all campaign strategies in order to meet your organizations fundraising goal
- Work closely with United Way staff to ensure success
- Maintain year-round contact with United Way in order to create ongoing engagement opportunities for your employees
- HAVE FUN!

STRATEGIES FOR SUCCESS:

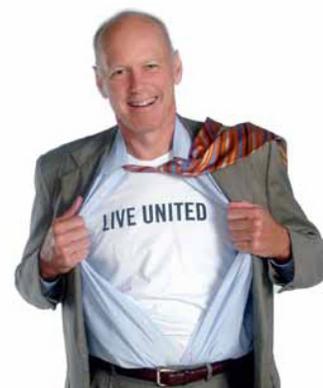
- Lead by planning ahead and starting early
- Meet with your United Way representative
- Recruit and train a committed team to help you
- Create a campaign timeline in order to implement all of your campaign strategies



ABOUT YOUR UNITED WAY

OUR MISSION:

United Way of the Brazos Valley brings the community together to find solutions that change people's lives by advancing Education, Financial Stability and Health.

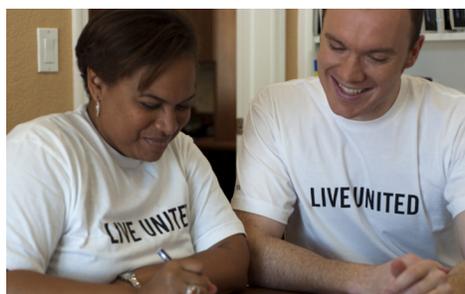


UNITED WAY FOCUSES ON THE BUILDING BLOCKS FOR A GOOD LIFE



EDUCATION

Enabling youth and adults to achieve their full potential from cradle to career.



FINANCIAL STABILITY

Empowering families to become financially stable now and through retirement.



HEALTH

Assisting people in making healthy lifestyle choices and obtaining affordable healthcare.

30 SECONDS ON THE UNITED WAY

Your never know when you might get asked to say a few words about your United Way. Here's a 30-second pitch on what we do and what it means to LIVE UNITED.

United Way of the Brazos Valley is working to find solutions that change people's lives by advancing Education, Financial Stability, and Health – the building blocks for a good life.

Everyone can win when kids succeed in school, families are financially stable, and people have quality healthcare. The goal is to create long-lasting changes that prevent problems from happening in the first place by identifying needs and strategic solutions and making investments in those solutions.

We all may be different, but we are united for the common good. Together, united, we can inspire hope and create opportunities for a brighter future.

That's what it means to LIVE UNITED.

CAMPAIGN BASICS: 5 STRATEGIES for SUCCESS

United Way of the Brazos Valley provides all of the assistance and resources that Campaign Internal Coordinators need to implement strategies that will maximize their company's campaign success. As you begin preparing for the campaign:

- Contact your United Way representative for assistance with planning and preparation.
- Visit our website at www.uwbv.org for ideas and resources including Campaign Tools.

STEP 1

AFFIRM TOP MANAGEMENT SUPPORT

Include representatives from as many levels and departments of your organization as possible.

- Gain approval for recruiting a campaign committee and holding campaign meetings and activities on company time.
- Ask for visible support from company leadership during the campaign.
- Invite your CEO to write a personal email or letter to employees expressing support for your United Way campaign.
- Discuss strategies for corporate support, i.e. corporate gift/match.
- Encourage your CEO and top management to participate in your planned activities and presentations.
- Discuss options for engaging senior staff through a focused leadership campaign.
- Have your CEO personally thank contributors for their gifts through letter, reception, special event, email or phone call.
- View sample letters at www.uwbv.org/campaign-tools.

**CHANGE
STARTS HERE.
CAN WE COUNT YOU IN?**

STEP 2

RECRUIT A CAMPAIGN COMMITTEE

To build a strong campaign team, recruit those you feel will be most effective in helping you organize the campaign and is a diverse representation of the organization.

- Speak with last year's Internal Coordinator to find out which committee members you might want to include in your campaign.
- Invite both new and previously involved committee members to participate.
- Set a schedule of committee meetings and distribute to members.

STEP 3

DEVELOP A CAMPAIGN PLAN

A key factor in making your campaign successful is gaining the support and enthusiasm of your fellow employees/coworkers.

- Invite your United Way representative to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within the company culture.
- Determine the means of pledging best suited to your company: pre-printed pledge forms, one-part pledge, online pledging, or other fundraising activities. Work with your United Way representative to arrange for delivery of all your campaign materials.
- Determine the campaign timeline including the pledging timeframe and any presentations and activities that will take place.
- Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, special events, securing incentives, etc.
- Evaluate past results and identify areas where potential for increases may exist –dollars raised, participation, etc. and set a campaign goal that focuses on these areas.

STEP 4

IMPLEMENT THE CAMPAIGN PLAN

Promote the Campaign

- Place information (posters, flyers, thermometers, etc.) in high traffic areas around your office such as entry ways and break rooms in the weeks leading up to the kickoff so employees have an opportunity to learn about United Way.
- Use multiple methods of communication to inform people about the campaign: post information on your intranet, announce the campaign at staff meetings, use payroll stuffers, etc.

Hold the Campaign Kickoff

- Start the campaign with your company's leadership team and campaign committee a week prior to the general kickoff.
- Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, timeframe, activities and incentives.
- Invite a member of the leadership team to the general kickoff meeting(s) to communicate management support of the campaign.
- Invite your United Way representative to speak at the meeting(s).





Luiminant Energy



Hilton Garden Inn

Educate your fellow employees

- Utilize United Way of the Brazos Valley's campaign video and ensure each employee gets the chance to view it.
- Take advantage of United Way's Partner Agency Speakers – Speakers provide real-life stories of how programs, supported by your gift to United Way, can change lives. The speakers will share their story and give examples of their extraordinary experience. These kinds of personal testimonies help illustrate United Way's value.
- Set up United Way Partner Agency tours – seeing is believing. Tours to United Way funded partners show how and where your dollars are invested in the community.

Contact your United Way representative at 979.696.4483 to schedule the above services.

Conduct a Leadership giving campaign

- Appoint a chair to organize the Leadership giving campaign – someone who currently contributes at a Leadership giving level.
- Work with your United Way representative to help identify potential Leadership donors.
- Recruit a team of Leadership donors to make peer-to-peer contact – ask your United Way representative to help train these volunteers.
- Conduct a special solicitation that specifically asks for a Leadership-level gift – by doing this prior to the overall kickoff, results can be announced to boost momentum and enthusiasm for the overall campaign.

Membership Levels

- Leadership Giver \$1,000 - \$4,999 annually
- Cornerstone \$5,000 - \$9,999 annually
- Toucqueville Society \$10,000 or more annually

**WE MAKE A
LIVING BY
WHAT WE GET.
WE MAKE A
LIFE BY WHAT
WE GIVE.**

-WINSTON CHURCHILL

Make the Ask

- Make sure that everyone is given the opportunity to make a contribution to the campaign – including part-time and off-site employees. The number one reason people say they didn't give is because they weren't asked!
- Personally distribute and collect pledge forms. Ask employees' pledges to be made immediately after the presentation and/or turned in within 48 hours of meetings so United Way is fresh on their minds.
- Let employees know there are other ways to give: cash, checks, credit cards and direct billing.
- Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference.
- Inform employees about opportunities such as United Way's Leadership Society.

STEP 5

Wrap-Up the Campaign and Say "Thank You"

The two most important words to remember and the ones people always appreciate the most are "THANK YOU!" You can never thank people too much and it is the best way to ensure their long-term support.

- Send out reminders to encourage people to turn in their pledges.
- Ensure all pledges are turned in. Collect payment for those who opted to make a one-time gift with a check or cash.
- Schedule a meeting with your United Way representative to finalize the campaign – pick up the campaign envelope, extra campaign supplies, etc.
- Report your final campaign results to employees and leadership.
- Personally thank all of your contributors and your committee.
- Have your CEO thank contributors and your committee with a special letter or email to everyone.
- Host a fun "thank you" event.



CAMPAIGN MATERIALS & RESOURCES

We understand that people are busy and the United Way Campaign is in addition to all of your other job responsibilities. With that in mind we want to give you all the tools, resources, and help, you need to make your campaign a success without becoming a burden.



- **Pledge forms**

Pledge forms are available in the original three-part format or a new one-part form.

- **United Way Brochures**

Offers a brief United Way overview and lists the programs and affiliated agencies supported by United Way.

- **Posters**

Use to promote the campaign and decorate for employee meetings and special events. Flip the poster at the completion of the campaign to say thank you to employees.

- **Banners**

Large banners can be borrowed for use during kick-off events and employee meetings.

- **Pins, Stickers & Other Promotional Items**

Use these to thank your donors when they complete their pledge.

- **Sample emails, letters, memos, agendas**

Are also available in the online toolkit at www.uwbv.org – choose THE LATEST and then Campaign Tools.

CAMPAIGN CHECKLIST



5-8 Weeks - Before Kickoff

- Arrange a meeting with your United Way of the Brazos Valley representative
- Establish a campaign committee
- Review/analyze last year's campaign
- Meet with and obtain CEO support of campaign

6 Weeks - Before Kickoff

- Conduct meeting of campaign committee to set goals, establish campaign timeline, plan events and develop a Leadership giving campaign
- Secure incentives and prizes
- Develop publicity and education plans

3-4 Weeks - Before Kickoff

- Start planning your Leadership meeting(s) & campaign kick-off
- Confirm all meeting arrangements with department heads and United Way representative
- Schedule tours of United Way of the Brazos Valley agencies with your United Way representative
- Arrange for an agency speaker with your United Way representative

1-2 Weeks - Before Kickoff

- Begin campaign promotion
- Send CEO letter/email to all employees
- Hold your leadership meeting to conduct executive/management solicitation
- Conduct tours of United Way of the Brazos Valley agency facilities
- Secure campaign supplies

Campaign Kickoff & Employee Meetings

- Hold employee kick-off meeting with CEO remarks, video, agency speakers and United Way representative
- Publicize results of Leadership campaign
- Conduct employee group meetings
- Continue follow-up with each employee – 100 percent ASK!
- Report progress to employees
- Give away prizes and incentives in drawing for those who have returned pledge forms

Campaign Wrap-up

- Hold special events
- Conduct final meeting with campaign committee and solicitors
- Prepare written evaluation and recommendations for next year's Internal Coordinator
- Meet with CEO and report final results
- Announce final report to employees
- Thank and recognize contributors

Final Report

- Submit final United Way campaign report to United Way office
- Submit leadership List to United Way for recognition in Leadership Registry





THANK YOU
WE ARE BETTER TOGETHER.



For Health and Human Resource Information in the Brazos Valley

Dial 2-1-1 www.211texas.org



GIVE



Connect to volunteer opportunities in the Brazos Valley

www.VolunteerBrazosValley.org



ADVOCATE



VOLUNTEER

ALISON PRINCE
President & CEO

aprince@uwbv.org
979-696-4483 x. 101

1716 Briarcrest Drive, Ste 155
Bryan, TX 77802



United Way
of the Brazos Valley

www.uwbv.org



@UnitedWayBV