

# LIVE UNITED™

## Guide for Campaign Coordinators

*Thank you for your commitment to running a United Way campaign in your workplace. Here is some useful information to help you lead a successful campaign. More helpful materials are available online at [uwrochester.org/CampaignResources](http://uwrochester.org/CampaignResources).*

### **Running a Workplace Campaign**

As a campaign coordinator, you lead by example...but you'll find your success can grow by leaps and bounds when your foundation comes from good planning, excellent execution, employee education and when visible support of your campaign comes from the 'top levels' of management. Here are some suggested steps to guide you.

#### **1) Analyze and Plan**

- Meet with your United Way representative
- Meet with your CEO to:
  - Send out an endorsement letter
  - Set a challenging campaign goal
  - Host a separate Management/Leadership Campaign
- Establish a campaign timetable
- Order campaign materials
- Recruit fellow staffers to lead as "volunteer fundraisers"
- Schedule a volunteer fundraiser training
- Host a kickoff rally... use posters, send e-mail notes to co-workers for weekly campaign updates, consider featuring employee testimonials when possible, and advertise your campaign internally
- Organize a Retiree Giving Campaign

#### **2) Implement**

- Schedule a Management/Leadership presentation
- Show the campaign video to all co-workers
- Use testimonials, incentives, and special events to inspire giving (i.e. extra vacation day, prime parking spaces, door prizes, etc.)
- Personalize all pledge forms
- Use one-to-one or group solicitation
- Encourage use of payroll deduction

#### **3) Wrap Up**

- Follow up on all outstanding pledge forms
- Report results to United Way
- Include a list of leadership givers (*form available at [uwrochester.org/CampaignResources](http://uwrochester.org/CampaignResources)*)
- Institute a *New Hires* program
- Recognize and thank all volunteers and contributors

## **Running a Leadership Campaign**

Conducting an effective, early management campaign and reporting results to your co-workers is one of the best ways for your company to get a jump on your general campaign. It sets the tone for employee giving and participation. Here are some suggested steps to guide you.

### **1) Analyze and Plan**

- Meet with your United Way representative to analyze last year's leadership results
- Analyze the potential for managers from all levels, and develop strategies for improvement
- Meet with your CEO to set a challenging management campaign goal
- Give your management campaign a powerful launch by letting your CEO make the first gift at a leadership level
- Send out an endorsement letter from your CEO that reinforces the case for giving
- Remember to schedule your campaign early... it helps set the pace for the employee campaign
- Order leadership campaign materials from United Way
- Encourage staff to be part of the Red Feather Society, Young Leaders Club, the Howard Wilson Coles Society, Circulo Latino or Women's Leadership Council. These leadership giving societies are specially designed for individuals and couples who contribute \$1000 or more (\$500 or more for Young Leaders Club) each year to United Way.
- Become familiar with the United Way Q&A in your Field Guide.

### **2) Implement**

- Ask your CEO to kick off the meeting
- Invite a senior manager from United Way to present the case for support
- Show the campaign video
- Hand out the Leadership Giving brochure
- Finish by describing the Leadership Giving levels

### **3) Wrap Up**

- Communicate leadership results to employees, to highlight management support
- Thank contributors for their support
- Prepare a list of leadership givers, (*form available at [uwrochester.org/CampaignResources](http://uwrochester.org/CampaignResources)*) and send to United Way