

Guide for Campaign Coordinators

Thank you for your commitment to run a United Way Campaign in your office. Here is some great and useful information to help you run your workplace campaign. You can find this information, and other resource materials on United Way's web site, as well. Just log on to www.uwrochester.org, and click on 'campaign toolkit.'

Running a Workplace Campaign

As 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 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 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, use the "management" version of the film to show
- Show the "general" version of the film to all co-workers
- Use testimonials, incentives, and special events to inspire giving (*ex. - extra vacation day, prime parking spaces, door prizes, etc.*)
- Personalize all pledge forms
- Use United Way's Excel spreadsheet database template to help track your campaign
- Use one-to-one or group solicitation
- Encourage use of payroll deduction

3) Wrap Up

- Follow up on all outstanding pledge forms
- Check donor choice forms for name, address, correct dollar amount, and signature
- Report results to United Way
- Include a list of leadership givers
- Institute a *New Hires* program
- Recognize and thank all volunteers and contributors

Running a Management 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... setting 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 management 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 management campaign materials from United Way
- Ask a United Way representative about arranging community provider tours and securing speakers for presentations
- Encourage staff to be part of the Young Leaders Club, the Howard Wilson Coles Society, or the Circulo Latino... these are designed for individuals and couples who contribute \$1000 or more each year to United Way (\$500 if under age 30)
- Become familiar with the United Way Q&A

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 leadership film
- Hand out the Leadership Giving brochure
- Finish by describing the Leadership Giving levels

3) Wrap Up

- Communicate management results to employees, to highlight management support
- Thank contributors for their support
- Prepare a list of leadership givers, and send to United Way

Reporting Results

After you set a campaign goal, develop a plan for record keeping and reporting. Two reports must be filed with United Way staff. The Mid-Report must be filed by April 21. The Final Report is due May 5.

When to complete the reports

- As soon as results are available from your fundraisers
- Before pledge forms are sent to payroll (does not apply to Retirees)
- **United Way is now able to accept pledges and designations electronically. If you are interested in sending an electronic file in lieu of pledge cards, please call (585) 242-6521 or (585) 242-6488 for specific instructions.**

Keep a copy of all pledge forms and the completed envelope. Please keep a copy for your files. It is important to supply all information requested and sign the envelope. Attach the United Way seal over back flap and sign. Call your United Way representative to pick up the envelope along with any bill-direct pledge forms, cash, employee checks, and donor choice designation forms. All payroll deduction forms must be submitted to your payroll department. If you are using a three-part pledge form provided by United Way, make sure the donor has kept the last copy and your firm has kept the top copy. The remaining copy, the yellow one, must be forwarded to United Way.

If you are not sending an electronic file, please follow these instructions:

1) Fully paid contributions

- Checks must be payable to United Way
- Staple donor choice form (if applicable) to the corresponding pledge form. Payments should be clipped to the forms
- Each pledge form must be signed by the contributor
- Please do not staple payments to pledge forms
- Record total cash/check contributors and dollars on the envelope

2) Bill-direct pledges

- Pledge forms must be legible and must show the contributor's name and address
- The minimum bill-direct pledge is \$25
- Record total bill-direct and credit card contributors and dollars on envelope
- Staple donor choice form (if applicable) to the corresponding pledge form... payments should be clipped to the form
- Each pledge form must be signed by the contributor

3) Payroll deduction pledges

- The employer should retain the white copy of the contributors' pledge forms as authorization to deduct pledges
- Record number of payroll deduction contributors and total dollars on the envelope
- Staple each donor choice form (if applicable) to the corresponding pledge form
- Please be sure to return the yellow page of the 3-part pledge form to United Way
- Each pledge form must be signed by the contributor

4) Complete the back side of the report envelope

- Fill out each section completely
- Enclose Leadership Giving Report Form For Retirees: Pension/Annuity deduction pledges
- The employer should retain contributors' pledge cards as authorization to deduct pledges
- Record the number of pension/payroll deduction contributors and total dollars on envelope
- If your organization is using the United Way provided one-part pledge card, please make sure you return the completed community investment card to United Way
- Each pledge form must be signed by the contributor donor choice designations
- Double-check donor choice designation forms to ensure that:
 - the form is signed
 - the method of payment is checked off
 - the total gift is entered
 - the designated amount, organization, and ID number is included
 - the designated amount is less than or equal to the total gift amount
- The donor choice forms should be stapled to the matching pledge form and placed inside the Group Report envelope
- United Way must receive designation forms by May 5 to be processed in the 2006 spring campaign and by November 10 for the 2006 fall campaign

