

# CAMPAIGN COORDINATOR'S GUIDE TO A GREAT CAMPAIGN



Boys & Girls Club of America - Tahlequah

## LAKE AREA UNITED WAY

GIVE. ADVOCATE. VOLUNTEER.  
LIVE UNITED. 



## On behalf of the community **THANK YOU** for being a **Campaign Coordinator** for the annual **United Way** fundraiser.

Being a Coordinator means spending time distributing materials, organizing events, and spreading the United Way message. As you utilize many resources to conduct your campaign, we hope you will also experience some direct benefits:

- **Become more connected to the people in your company.**
- **Strengthen relationships with your co-workers.**
- **Demonstrate your leadership skills.**
- **Network with others in the community through United Way events.**
- **Have some fun!**

Whether this is your first time as a coordinator or you have coordinated your campaign multiple times, this handbook will help you get the most out of your United Way campaign. Just follow the steps for conducting a successful campaign, and you are guaranteed to have a great campaign.

Thank you again for volunteering to be a part of the annual United Way Campaign. By giving your time, talent, and spreading the word, you are helping to advance the common good. Together, UNITED, we can inspire hope and create opportunities for a better tomorrow.

That is what it means to **LIVE UNITED**.

**Reach out a hand to one, influence the condition of all.**

*Campaign Coordinator resources are also available at our online toolkit at [www.lakeareaunitedway](http://www.lakeareaunitedway).*



# WHAT DOES A CAMPAIGN COORDINATOR DO?

**Description:** Employee Campaign Coordinator (ECC)

**Goal:** To enable your co-workers to participate in creating a stronger community by planning, organizing and coordinating a successful United Way campaign within your company.

## Key Responsibilities:

- Attend United Way Coordinator training.
- Work closely with your CEO and other staff, United Way volunteer, and UW personnel.
- Develop an effective campaign plan including dates, goals, etc.
- Recruit a team of volunteers to assist you.
- Request speakers and tours from United Way office.
- Coordinate the distribution and collection of campaign materials.
- Coordinate your company's kick-off and recognition events.
- Promote the campaign throughout your company.
- Encourage leadership giving in your campaign.
- Encourage giving of time, talent, and resources among your co-workers.
- Educate your co-workers about United Way year round.
- Attend United Way kick-off and celebration events. Invite your co-workers.
- Invite everyone to give, and set an example by making a gift yourself.
- Make your company campaign fun! (See the FUNdraising Ideas Handbook)
- Complete your final report and send it with pledge forms to United Way.
- Thank your donors and volunteers.
- Evaluate and make recommendations for next year.



# ABOUT UNITED WAY

## OUR MISSION

Mobilizing resources to advance the economic well-being, education, and health of our community.

## OUR VISION

To be the leading organization building a stronger, healthier, and more compassionate community.

## OUR STRATEGIC OBJECTIVES

**Community Impact** – Engage and align key community stakeholders in creating, evaluating and measuring solutions that address impact areas – education, income and health. United Way will advocate for these areas by advancing a public policy agenda that supports these initiatives throughout our communities.

**Resource Development** – Increase resources to meet community needs by encouraging a customer-focused culture that engages donors with priority issues to which they have an affinity, and promotes stewardship for community philanthropy.

**Brand Management** -Enhance awareness of health and human service needs and resources throughout the Muskogee and Tahlequah areas, and position United Way as the best way to mobilize resources to meet these needs.

**Organizational Leadership** – Achieve a mission-centered and vision-driven organization that enhances the effectiveness and alignment of all resources (financial, volunteers, board, staff partners, policy makers, etc.) and supports a customer-focused work environment.

**Volunteerism** – Build upon United Way’s role as a champion for volunteerism by creating broad access to volunteer opportunities that will engage donors and others with priority issues, and support life-long service to the community.

**Operational Stewardship** – Be a responsible steward of United Way financial and operational systems in an atmosphere of fiscal transparency and community trust.

## UNITED WAY FOCUSES ON THE BUILDING BLOCKS FOR A GOOD LIFE



### ENHANCING EDUCATION

Helping children, youth,  
and adults achieve their  
potential

United Way works to improve access to quality and affordable education, improve school readiness for kids, and ensure early childhood development prepares children for successful school years. United Way invests in youth development and leadership as a part of workforce development. These tools prepare young people for a productive life and increases their ability to take advantage of lifelong learning opportunities.



### INCREASING INCOMES & FINANCIAL STABILITY

Promoting financial stability  
and independence

United Way understands the importance of an affordable and safe environment. United Way funds financial literacy education classes so families can take better control of their income. Funds help with personal disasters such as house fires or community disaster relief, and supports seniors so they can remain in their homes longer. United way also partners with workforce training and job placement opportunities so families can remain self-supporting.



### PROMOTING HEALTH & WELL-BEING

Improving peoples' health

Health is the single most important aspect for a quality life. United Way understands improving people's access to health care options, fighting childhood obesity, reducing participation in unhealthy activities, and promoting mental health are essential to a community's well-being.



# CAMPAIGN BASICS: 10 STEPS TO SUCCESS

Managing a successful United Way campaign can be fun and easy. The most successful Campaign Coordinators have found the following tips to be instrumental to their attempts.

## 1. GET CONNECTED

- Contact your United Way office to discover how we can assist you.
- Attend the annual Campaign Coordinators Training in August.
- Visit the online toolkit for in-depth ideas and access to campaign resources.

## 2. OBTAIN TOP MANAGEMENT SUPPORT

- Talk to your company's leadership about approving a campaign committee and budget and allowing use of company time for campaign meetings and activities.
- Ask top managers to publicly support, endorse, and participate in the campaign and events.
- Discuss the possibility of matching a percentage of employee gifts with a corporate contribution.
- Develop a strategy for engaging other company leaders, possibly through the use of a separate leadership campaign.

## 3. RECRUIT A STRONG CAMPAIGN COMMITTEE

- Build a campaign team that is diverse and includes individuals from multiple departments, union members, and every level within the organization.
- Team members who have been helped or had prior involvement with United Way are a great addition and can speak personally during the campaign.
- Invite your United Way representative to your campaign planning meetings to answer questions and offer ideas.

## 4. DEVELOP YOUR CAMPAIGN PLAN

- Set a campaign timeline. Most campaigns run in the fall with a duration of about two weeks.
- Set a campaign goal.
- Identify some areas for improvement and set some measurable goals to achieve them. Some companies may identify a dollar goal, increased participation, or increased average gift as their goal. Talk to your United Way representative for more help in identifying your campaign goals.
- Identify campaign responsibilities and which team member will be responsible for them. Who is in charge of the pledge forms, the campaign events, incentives, and collection of the forms?
- Consider some incentives that can be used to entice new donors and encourage existing donors to increase their contributions.
- Choose campaign strategies and approaches that fit your company culture.

## 5. PROMOTE AND PREPARE

- Promote the campaign with posters, banners, and flyers. Include campaign
- Communications in company newsletters and through a memo from the CEO.
- Work with your United Way representative to ensure that you have pledge forms and all other necessary campaign material for the campaign.
- Send a daily United Way email during the campaign with United Way facts.
- Announce the campaign at various department and staff meetings.
- Promotional posters and other material can be found online in the toolkit.

## 6. CAMPAIGN KICK-Off

- Start your campaign with leadership and senior managers one week prior to your general campaign.
- Make your personal gift to United Way before the campaign begins.
- Invite all staff to a kick-off event that communicates management support, campaign goals & activities.
- Invite your United Way representative to speak at the kick-off and campaign events.

## 7. MAKE THE ASK

- Make sure that everyone is asked to give through the kick-off, department meetings, and through one-on-one conversations. The number one reason people say that didn't give to the campaign is because they weren't asked!
- Have the campaign committee personally distribute pledge forms and ask their co-workers to join them in their support of United Way. Be prepared to talk about why you support United Way.
- Show donors the impact that their individual contribution makes. Giving goes up when people know their gift is making a real difference.
- Be prepared to answer questions about United Way to help employees know how United Way works.
- Tell employees when the campaign ends, where to turn in their forms and how they can get more involved.

## 8. MONITOR AND REPORT YOUR PROGRESS

- Keep a running total as the pledges are collected. Compare against the goals identified by the campaign committee.
- Provide regular progress updates to employees.
- Hold a mid-campaign review to check the progress towards your goal. Identify any possible interventions.
- Make personal follow-ups with individuals who have not turned in their pledge form.

## 9. CAMPAIGN WRAP-UP

- Collect pledge forms and donations from employees.
- Schedule a meeting with your United Way representative to complete all required paperwork.
- Report your final total to employees and leadership.
- Hold a final campaign committee meeting to evaluate your efforts.
- Thank everyone! Send thank you emails, a thank you memo from the CEO, hang thank you posters. Don't forget to send a special thank you to the campaign committee!

## 10. YEAR ROUND ENGAGEMENT

- Share United Way updates and news with employees year-round so that they can see the impact of their contributions.
- Arrange a United Way volunteer project to further engage employees.
- Hold a Brown Bag Seminar to expose employees to United Way's partner agencies.
- New hire and retiree packets can be used to introduce new employees to United Way and allow retirees to continue their involvement.

# BEST PRACTICES

## CAMPAIGN MEETINGS

The most successful United Way campaigns have one thing in common; they all utilize employee meetings to build awareness and excitement around the campaign. These presentations are essential to the success of your campaign.

## PLANNING CONSIDERATIONS

- Tag onto an existing company/department meeting to make efficient use of company time.
- Keep the meeting between 15 and 20 minutes.
- Contact your United Way representative who can supply pledge forms, brochures, and posters.
- Ask your United Way representative to speak during employee meetings to expose employees to the mission, programs, and resources provided by United Way.
- Communicate campaign details such as timeframe, incentives, and other events.
- Follow up individually with employees who missed the meeting.

## PRESENTATION CHECK LIST

- Secure a time, date, and location for the meeting.
- Promote the meeting to employees
- Gather campaign material
- Prepare an agenda for the meeting.
- Secure the attendance of company leadership and your United Way representative.

## FOLLOW-UP CHECK LIST

- Collect pledge forms and cash or checks.
- Distribute incentives.
- Follow-up with individuals who did not return their form.
- Tally your results and schedule a meeting with your United Way representative.

## SAMPLE AGENDA

- Opening remarks – Campaign Coordinator and/or CEO
- United Way Overview – United Way Representative
- Pledge form review – United Way Representative
- Campaign details – Campaign Coordinator
- Closing remarks – Campaign Coordinator and/or CEO

A successful campaign is built on a foundation of clear and concise communications. Every organization is unique and not all communication methods will work in all environments. The following are various communication channels you can use. Each has its strengths and weakness and must be considered with your company's culture in mind.

# COMMUNICATION

## EXAMPLE CAMPAIGN COMMUNICATIONS

### Campaign Announcement Memo

Send a memo a couple of weeks in advance of the campaign kick-off. Give the highlights of the campaign and sign the letter from the campaign committee.

### Campaign Committee Recruitment Letter

Send a letter if you receive approval for a campaign committee. Include basic responsibilities and time frame. Have it signed by the CEO so employees aren't hesitant to volunteer.

### Incentive Solicitation Letter

Many campaigns ask local business to donate prizes for use during their campaign. A form letter signed by the CEO can be used for multiple incentives.

### CEO Campaign Memo

Leadership support is essential to a successful campaign. This letter should be sent by a key decision maker in the organization and should outline their support and involvement of the United Way campaign.

### Campaign Update

Send out communications at regular intervals during the campaign. Give employees a United Way success story, let employees know the progress relative to the goal, and include the deadline for participating.

### Thank You

Consider sending specialized thank you notes to individual donors. Be sure to send out a mass thank you to all the employees and recognize the efforts of the campaign committee and the support of the leadership team.

### Campaign Results

At the conclusion of the campaign once all the pledges have been tallied, send a memo highlighting your results. Be sure to compare your achievements to your goal and to recap the campaign activities and the difference employees made in the community.

## ELEVATOR SPEECH

*You never know when you may be asked to say a few words about United Way. Here's a 30-second pitch on what United Way does and what it means to **LIVE UNITED**.*

Lake Area United Way is working to advance the common good by focusing on **Enhancing Education, Increasing Financial Stability, and Promoting Health & Wellness** because these are the building blocks for a good life --- a quality education that leads to a stable job with enough income to support a family through retirement and provide good health opportunities.

Our goal is to create long-lasting changes that prevent problems from happening in the first place. We invite you to be part of the change. Together, united, we can inspire hope and create opportunities for a brighter future. That's what it means to **LIVE UNITED**.

# STRATEGIES FOR IMPROVING PERFORMANCE

## RAISE AWARENESS

- Use multiple methods of communication to promote the campaign.
- Contact your United Way representative for posters, brochures, success stories, and talking points and place them strategically around the workplace.
- Provide progress updates throughout the campaign.
- Utilize a United Way speaker at the kick-off event and employee meetings.
- Arrange a United Way volunteer project for interested employees.
- Use special events to engage employees.
- Practice year round engagement.

## INCREASING PARTICIPATION

- Be sure every employee is asked to give through multiple channels.
- Plan to reach every employee in every department on every shift.
- Consider incentives designed to encourage participation and entice new donors.
- Create a competition between departments for best participation.
- Arrange a United Way volunteer event.
- Ask new employees and retirees to get involved.
- Use special events to engage employees and keep the campaign fun.

## INCREASING THE AVERAGE GIFT

- Personally ask donors to increase their gift over the previous year.
- Encourage payroll deduction as an easy way to increase giving.
- Promote Leadership Giving as a way for employees to connect with local leaders and give back to the community. For more information on United Way's Leadership Giving Club, please visit the campaign toolkit online.
- Structure campaign incentives around giving levels and encourage employees to increase their contribution.
- Personalize pledge cards with each employee's previous gift.

## YEAR ROUND ENGAGEMENT

- Share United Way updates and news with employees year-round so that they can see the impact of their contributions.
- Arrange a United Way volunteer project to further engage employees.
- Hold a Brown Bag Seminar to expose employees to United Way's partner agencies.
- New hire and retiree packets can be used to introduce new employees to United Way and allow retirees to continue their involvement.



# YEAR ROUND INVOLVEMENT

United Way wants to engage employees in philanthropy year-round, not just during the annual campaign. United Way offers you and your employees numerous ways to get involved in the community through giving, advocating, and volunteering.

Here are some ways that you can continue the momentum built by your campaign through the rest of the year. Get employees involved in United Way volunteer opportunities.

- Publish United Way success stories and news updates in the employee newsletter and around the office.
- Hold Brown Bag seminars to educate employees about health and human service topics that interest them.
- Participate in United Way's Day of Caring.
- Send a group of employees to United Way's annual meeting to network with other community supporters.



***Georgia Pacific Volunteers  
Day of Caring at Girl Scouts of Eastern Oklahoma***

# FREQUENTLY ASKED QUESTIONS

**Q: What is United Way?**

**A:** Lake Area United Way is an independent nonprofit organization governed by local volunteers representing the community, bringing people and organizations together. United Way acts as a catalyst for positive change, helping to create and build the resources necessary to improve the quality of life for those who live and work in our area.

**Q: How does United Way serve the community?**

**A:** Lake Area United Way supports health and human service non-profit organizations through its strength in fund-raising and effectively reinvesting them into the community. This includes volunteer resources and by building community collaborative partnerships. United Way is the single largest funding stream supporting human services in the Muskogee and Tahlequah areas. LAUW's campaign provides financial support for 14 member organizations.

**Q: What kind of programs does United Way support?**

**A:** The programs supported by United Way provide a variety of critical services to the community, including food, shelter and emergency services, early child development, family support, health care services, care for the elderly, and assisting people with disabilities and youth development.

**Q: How do programs receive funding?**

**A:** After requesting affiliation with United Way, member organizations and programs must go through a formal review process. Groups selected to receive funding through Lake Area United Way are nonprofit, tax-exempt charities governed by local volunteer boards. Each member organization must submit to an annual independent financial audit and provide services to the community at a reasonable cost. A re-certification process ensures agencies maintain high standards of stability, accountability and continued quality service.

**Q: I don't use any of the member organization programs, so why should I give through United Way?**

**A:** You may have already used the services of a United Way agency and never realized it. One day, each of us may need disaster services, youth development services, literacy services, or a variety of other valuable resources offered through United Way's collaborative programs. Everyone benefits in some form such as services which reduce juvenile crime, or those which provide youth development and leadership.

**Q: Who is eligible for United Way services?**

**A:** Services supported by Lake Area United Way are available to people who live and/or work in the east central area of Oklahoma.

**Q: Why should I choose to give through United Way?**

**A:** Through United Way's annual citizen-review process, trained volunteers assess the value of each funded program and how best to distribute funds for the greatest community impact. When you contribute to United Way, you know your gift is part of a long range solutions designed to elevate our community. Dollars raised in the community stay in the community and help support a variety of programs and other local initiatives.

**Q: Who governs United Way?**

**A:** Volunteers from the community, residents and employees of local businesses, govern Lake Area United Way by serving as volunteer Board members.

**Q: Why should I give if my spouse does?**

**A:** We hope you and your spouse both will consider a gift. United Way and our community depend on each individual to make a gift based on his or her own income. These gifts when combined with other gifts make the greatest impact on solving the challenges which keep our community from advancing economically. United Way programs can only continue to provide services if as many people as possible contribute. Combined household donations may place you at a Leadership Giving level.

**Q: How much of my contribution goes directly to service providers?**

**A:** Making use of a vast network of volunteers and with a strong emphasis on efficiency, United Way strives to keep administrative costs low. 99% of all donations received go to support the non-profit community under the United Way umbrella.

**Q: Why should I consider using payroll deduction for my contribution?**

**A:** Payroll deduction is an easy and affordable way to budget your charitable giving, allowing you to contribute a small amount of your paycheck over a longer period of time. If your company has a matching gifts program, you automatically increase the amount of money being pledged. The efficiency of the payroll deduction system allows more of your contribution to go directly to service providers by helping to keep administrative costs low.

**Q: Can I specify where I want my contribution to go?**

**A:** United Way strongly recommends you invest your gift in Lake Area United Way's Muskogee and Tahlequah community funds, where your dollars will have the greatest impact on addressing these community's most critical needs. Donors have the option of designating all or a portion of their annual gift to specific organizations or community initiatives. All eligible organizations are listed on the United Way pledge card.

**Q: What is the United Way's policy against pressuring employees to give?**

**A:** Lake Area United Way has a policy against coercion, and under no circumstances should an employee be threatened or coerced into contributing. Giving is a personal matter and decision; whether people give and how much they choose to give is up to the individual. The purpose of United Way is to offer people an opportunity to give so others may receive the help they need. We hope you will give out of your generosity and because you feel good about helping others. Your giving should be personal and "from the heart."

**Q: How much should I give?**

**A:** Only you can decide how much you can give.

## CONTACT US

United Way staff is here to assist your company with its campaign efforts. There are no silly questions --- just ones without answers. Contact us if you need assistance. We can help with resource materials and suggestions to take your campaign to the next level.

Remember --- every dollar raised helps change lives in the community.

Please feel free to contact us is when you have questions, comments, or concerns.

Lisa Smith  
Executive Director  
[director@lakeareaunitedway.org](mailto:director@lakeareaunitedway.org)

Terry Beutelschies  
Outreach Coordinator  
[terryb@lakeareaunitedway.org](mailto:terryb@lakeareaunitedway.org)

P.O. Box 1612  
311 Court Street  
Muskogee, OK 74402  
Phone: 918-682-1364  
Fax: 918-682-0597  
Website:  
[www.lakeareaunitedway.org](http://www.lakeareaunitedway.org)