

Employee Campaign Coordinator Tool Kit 2009



United Way
of Bucks County

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LIVE UNITED™ 
WWW.UWBUCKS.ORG

Employee Campaign Coordinator Toolkit

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ECC Folder also contains pledge form, 2009 brochure, raffle incentives, leadership information and agency listing.



Campaign Season 2009

Dear Employee Campaign Coordinator,

Whether you are new to the campaign or have been representing your company for many years, we wish to thank you for taking on this important role of Employee Campaign Coordinator (ECC). Your time and enthusiasm as ECC will help to determine the success of our Annual Giving Campaign, and we can't do it without you. We appreciate your time and talent in organizing and facilitating a successful company campaign. By working with United Way of Bucks County you and your co-workers have the opportunity to make our County safer, stronger and happier for all residents.

United Way's "Live United" theme emphasizes the impact we can make by providing our individual resources to advance the common good. Everyone can participate, whether you Give, Advocate, Volunteer – or – hopefully, ALL 3!

In these times of economic uncertainty, United Way of Bucks County continues to focus on the building blocks of a good life: Education, Income, and Health. When you and your organization partner with United Way you help all Bucks County residents.

As an ECC, you play a huge part in communicating the United Way message of caring to your fellow employees. We know you are busy and we especially value the time you are dedicating to your workplace campaign. In an effort to clarify and simplify your role, we have created the enclosed User Friendly Tool Kit. Please take the time to familiarize yourself with United Way's mission, the elements of an exceptional campaign and of course the resources available to assist you.

On behalf of the United Way of Bucks County's Board of Directors and the United Way staff, we say THANK YOU! Many in our community will benefit from your generosity. Thank you for helping Bucks County LIVE UNITED.

With thanks,

A handwritten signature in blue ink that reads "Bruce Iacobucci".

Bruce C. Iacobucci
President & CEO
First Federal of Bucks County
UWBC Campaign Chair 2009

A handwritten signature in blue ink that reads "M. Bannon".

Michael D. Bannon
Director, Dept. of Consumer Protection
County of Bucks
UWBC Campaign Vice Chair 2009

Why Invest in United Way?

WE WANT YOUR GIFT TO HAVE THE BIGGEST IMPACT FOR YOU AND YOUR COMMUNITY!

Your investment in United Way helps us address root causes and find lasting solutions to our community problems. Your generous support to the Community Impact fund will make a difference far greater than any one person could make on their own.

YOUR GIFT WILL REMAIN LOCAL, GO FURTHER, AND GET RESULTS.

Your contribution will improve lives and strengthen the community where you and your family live and work. When you join forces with United Way, you help create lasting change.

CREATING THE OPPORTUNITIES FOR A GOOD LIFE FOR ALL BY FOCUSING ON:

EDUCATION

Helping Children and Youth achieve their potential for:

School Readiness

Academic Achievement

Becoming Productive and Engaged Young Adults

Quality Child Care and Pre-School, Literacy, After School Programs, Scouting, Summer Camp, Prevention Education and Enrichment Programs.

INCOME

Promoting Financial Stability and Independence by:

Increasing Income and Savings

Emergency Assistance

Establishing Financial Assets for Long Term Stability

Job Training, Decision Making Skills, Financial Literacy, Counseling, Coordination of Services, GED programs and Affordable Housing.

HEALTH

Improving People's Health through:

Access to Health Care

Prevention of Violence and Abuse

Healthy Youth, Adults, and Seniors

Violence Prevention Education, Access to Health Care Information and Services, HIV/AIDS Case Management, Drug and Alcohol Counseling and Child Abuse prevention.

United Way of Bucks County brings our community together to achieve what matters most – improving lives. Our United Way is committed to helping children be ready to succeed when they enter school, ensure families remain strong and achieve long-term economic independence.

Success Stories

Mrs. Ainsworth



As a 70-year-old woman, Mrs. Ainsworth was enjoying living independently at Bucks County Housing Authority. But when a bad fall injured her and left her unable to walk, use the bathroom independently, or cook for herself, Mrs. Ainsworth felt hopeless. She was afraid that she would have to depend on others for the rest of her life. A Case Manager funded by United Way is available onsite to assist residents in finding help or resources.

In this case, the Case Manager helped Mrs. Ainsworth obtain Meals on Wheels, medication adjustments, and temporary services. With her Case Manager's encouragement and reassurance, Mrs. Ainsworth's emotional outlook improved. After about 3 months, she returned to her previous level of independence. Funding from the United Way supports the Case Management Program that helps at-risk seniors like Mrs. Ainsworth to maintain independence.

At 16, Rebecca was unprepared for the challenges she faced. Her unintended pregnancy had forced her to move from her parents' house to her grandmother's house and change schools. She had no support from her friends or the father of her baby.

Rebecca's school nurse's office referred her to the Child, Home, & Community program (CHC), which offered weekly prenatal classes. She received guidance about medical care, nutrition, and the importance of the health of her baby. She also connected with other young mothers-to-be and received peer support.

Rebecca delivered a healthy baby boy named Ryan, and together they attend monthly sessions of their CHC support group where Rebecca learns parenting skills. Thanks to the programs offered by CHC, Rebecca returned to school for her senior year and developed into a thriving parent with a hope for a successful future.

Rebecca



The Caseys



Like many families, the Caseys had difficulty creating and maintaining a budget. When monthly expenses increased and their hours were cut back at work, they didn't understand the importance of putting money away for emergencies and often had trouble paying monthly bills.

The Caseys came to Credit Counseling Center wanting to take out money from their 401(k) to get caught up on their bills. The Center's trained counselors performed a financial assessment of the family, determined that they did not need to dip into their 401(k), and sent them home with a budgeting game plan.

After several office visits and more guidance, the Caseys paid their bills, budgeted for the future, and began responsible spending habits. Mrs. Casey says, "For the first time ever, I am in control of my bills and have money in the bank." United Way wants Bucks County families to reach self-sufficiency, and programs at agencies like the Credit Counseling Center are making a difference, one family at a time.

Your Role as Employee Campaign Coordinator

The success of a workplace campaign depends upon people like you - people who understand their organization's corporate culture AND United Way's benefit to the community. Thank you for your energy, excitement and enthusiasm!

WHAT'S YOUR ROLE?

Identify a Team: Don't do it alone, recruit and lead your in-house team.

Learn: About United Way's Community impact areas: education, income and health and how they make a difference in our community.

Set Pace: Schedule start and end dates for your campaign. Schedule Kick-Off and closing celebration dates, too.

Set the Tone: Make the campaign a fun and team building experience.

Coordinate: Plan a Campaign Kick-Off and utilize special events to make the campaign fun. Don't forget to include a closing celebration to thank donors and volunteers.

Communicate: Reach out to potential donors, keep in touch with your CEO, Campaign Team and your United Way Staff Representative.

Recognize: Recognize and thank your volunteers and donors.



Let us know how we can help you!!

Remember that United Way staff is here to assist you in all aspects of the campaign. As you become familiar with United Way, we know you will feel good about the important work you are doing for the community and the difference you are making in the lives of Bucks County residents.

And most importantly – ***Have Fun!***

How to Conduct a Model Campaign

- Communicate endorsement of CEO or Top Management and Union Representative (if applicable).
 - Ask your CEO to write a letter of endorsement to email to employees.
 - Schedule your CEO to speak at Kick-Off.
 - Request letter of support from Union Representative.
- Plan a Campaign Kick-Off.
 - Create excitement with posters, publicity, and presentations.
 - Choose a theme.
 - Schedule Kick-Off event and contact United Way representative for assistance.
 - Generate excitement with a Countdown to the Kick-Off.
- Set Goals (participation/monetary)
 - Utilize the goal setting sheet provide by UWBC to judge your company's capacity to make a difference through their gifts.
 - Review previous year's campaign and focus on areas of growth.
- Hold employee presentations and invite your United Way representative.
 - Bring employees together to hear firsthand of UW's value to the community.
 - Ask all employees to fill out pledge cards at the close of the meeting.
- Ask all employees to return their pledge forms.
 - Ensure that all employees are aware of the campaign, regardless of whether or not they are donating.
 - Utilize e-pledging or on-line giving when applicable.
 - Personalize pledge forms when possible.



- Utilize United Way Campaign Materials
 - Show United Way Campaign Video.
 - Educate your audience by sharing stories of people who have benefitted from United Way services.
 - Email updates and reminders.
 - Distribute success stories that show the impact of donor's gifts.
- Promote United Way's Campaign Incentives.
 - Increase employee awareness of generous community sponsors of UWBC raffle.
 - Publicize a donor's chance to win a raffle prize.
 - Offer in-house incentives such as raffles and giveaways.
 - Make giving fun through prizes, contests and special events.
- Encourage Leadership giving with a special presentation to the management team prior to the general employee solicitation.
 - Many CEOs make Leadership gifts and can encourage others capable of giving at Leadership levels.
 - Reach out to Management Team and existing Leadership Donors.
- Additional Outreach
 - Reach out to those beyond the boundaries of your building who have a stake in your community.
 - Retirees, Sales Force, and Regional Employees.
- Say "thank you" to donors.
 - Thank all employees for participating through emails, letters, and campaign awards.
 - Hold a closing celebration.



Goal Setting Worksheet

What will our goals be?

There is great value in setting goals that will affect both the quality of the process and the final outcome.

- **Multiply # of Employees x \$52 (\$1 a week for a year)**
- **Get prior years giving statistics from United Way**

Campaign 2008 Results

Payroll Deductions	_____
One-Time Gifts/Checks	_____
Credit Cards	_____
<hr/>	
Employee Campaign Total	_____
Corporate Gift	_____
Special Events	_____
<hr/>	
Total Campaign 2008	_____

- **Encourage 100% participation. No matter the size of the gift.**

Sample Goals

Raising Awareness:

- 30% of employees visit nonprofit organizations.
- 100% solicitation.
- 100% return of pledge forms (whether they give or not).
- Publicly thank steady givers.

Increasing Giving:

- Increase participation by 15%.
- Increase average annual gift or per capita gift by \$25.
- Achieve 80% participation in every department.

Customize Your Campaign

Promote Leadership Giving

United Way recognizes those in our community who demonstrate an exceptional commitment to helping others. We proudly recognize those whose contributions are \$1,000 or more as Leadership givers, and those who contribute \$10,000 or more as Tocqueville Society members. Donors are publicly recognized at special events and/or in local and national publications for their leadership and Tocqueville level gifts in support of United Way's mission to improve lives and strengthen communities.

1. Recruit CEO or Executives who themselves are Leadership givers to help with solicitation of top management.
2. Suggest that donors currently giving between \$700 and \$900 increase to the Leadership Level.
3. Hold a separate reception hosted by the CEO.

Organized Labor

Since 1946 the United Way of America and the AFL-CIO have enjoyed a mutually beneficial partnership. Locally organized labor is represented on the United Way of Bucks County Board and on numerous working committees.

1. Utilize Organized Labor Endorsement.
2. Request labor endorsement and joint letter from CEO and in-house Labor Representative.
3. Request union leaders endorsement at Kick-Off events or other appropriate venues.

Retirees

Don't forget your retirees. The biggest reason that retirees do not contribute to United Way is that they have not been asked. Do not overlook this important segment of your campaign; they often have a history of significant giving.

1. Include them in informational emails as company policy permits.
2. Make a special effort to inform this group of the impact of their gift.
3. Provide United Way with their names and addresses so we may continue to update them throughout the year.
4. Publicly recognize retirees for their gifts.

Campaign Coordinator Checklist

PLANNING

- Meet with United Way representative to review last year's giving and develop campaign strategy.
- Meet with CEO and union representative (if applicable) to confirm commitment.
- Obtain letters of endorsement from CEO and Union Representative (if applicable). (See Sample Endorsement Letter)
- Recruit, build, and meet with your team to plan the campaign.
- Determine the type of campaign best suited for your company:
 - Group meetings
 - One-on-one solicitation
 - Combination of both
- Schedule dates for training, group meetings/one-on-one solicitations.
- Schedule/request speakers, displays, and videos.
- Order your campaign supplies from your United Way representative (brochures, pledge forms, and posters).
- Order additional supplies, prizes, promotional materials at www.unitedwaystore.com.
- Hang posters and create visual displays to generate excitement.
- Organize incentives, contests, giveaways, or fundraisers (see Making your Campaign Fun)

PARTICIPATION

- Announce campaign goal (participation/monetary).
- Start your campaign by holding a Kick-Off Event.
- Make arrangements for a United Way speaker.
- Hold employee group meetings and distribute United Way information.
- Send out emails throughout the campaign with periodic updates (see Sample Ideas for Voice Mail or Email).
- Reach out to employees one-to-one.
- Solicit your retirees, sales force, and regional employees.

FOLLOW-UP

- Follow up contacts for absentees or those who have not responded.
- Send out additional emails (see Sample Ideas for Voice Mail or Email).

CLOSE-OUT CAMPAIGN

- Tabulate results and submit report envelopes to United Way.
- Thank supporters (see Sample Thank You Letter).

Making Your Campaign Fun

A fresh and fun campaign makes your job more enjoyable, creates greater awareness among your coworkers, and boosts company morale. Use your imagination & have fun!

This year, pledge just \$6 a week and you're eligible to enter to win one of three exciting Campaign Incentives – a Home Entertainment Package (valued at \$5,000), a \$2,000 Gift Card, or a 100 second shopping spree at McCaffrey's.

INCENTIVES

By offering incentives for those who participate in the campaign you generate more visibility, increase participation, and create interest in United Way!

- Reserved company VIP parking space
- Extra vacation days (we find this is the most popular)
- Vendor prizes
- Lunch with the boss
- A vacation raffle (use company frequent-flyer miles)
- Clothing/book/restaurant gift certificates
- Company T-shirts, coffee mugs, desk calendars
- Hotel weekend for two
- Lottery/sports tickets

PARTIES

- Have fun and teach people about United Way
- Ice cream social
- Pancake breakfast
- Chili cook-off
- Pizza party

FUNDRAISERS/CONTESTS

- Jeans Day for United Way (or Dress Down for United Way)
- Pumpkin carving or Halloween costume contest
- Baby picture guessing game
- Company campaign logo or poster designing contest
- Company bowl-a-thon
- Silent auction
- Miniature golf
- Employee cookout
- Executive dunk tank
- Executive pie toss
- Talent show
- Car wash
- Bake sale



Quick Facts

Please copy and paste any of these informational items into your corporate communications to your fellow employees.

i.e., Did you know _____?

United Way of Bucks County is working all year round, and [Your Company] is proud to be an ongoing supporter of its work in our community.

Did You Know.....

- The United Way movement was started by 1 priest, 2 ministers and a rabbi (this is not a joke!) in Denver Colorado in 1887.
- Each United Way is an individual organization that is run by its own volunteer Board of Directors. All decisions regarding funding of programs are made by volunteers.
- United Way of Bucks County funds over 50 programs through 33 non-profit human service organizations throughout the County. United Way of Bucks County supports programs that provide “a hand up – not just a hand out.”
- Economists have determined that every \$1.00 invested in early childhood saves up to \$17.00 in support services later on.
- By investing in United Way of Bucks County’s Community Impact Fund, you are investing along with gifts from thousands of others in the most pressing community needs: Education, Income, and Health.
- The easiest way to give is through Payroll Deduction. For just a few dollars per pay you will be helping to change lives right here in Bucks County. Possibly that of a friend, neighbor, coworker or family member.
- Want to keep up to date on what’s happening with your donation through the United Way of Bucks County? Go to their web-site at www.uwbucks.org for all the latest information and to sign up for their e-newsletter.
- If you or someone you know is looking for help, we’ve got “Connections”. “Connections” is an information and referral guide prepared by United Way of Bucks County and is located on their web-site. Go to the homepage and look for the “Connections” logo. Just search by keyword (i.e., childcare, financial assistance, emergency services, etc.)
- United Way of Bucks County supports the First Call For Help call line. Call 215-949-1660 if you need assistance.
- And... if we haven’t given you enough reasons to donate to United Way of Bucks County, here’s one more – by donating you get into a raffle for great prizes. See the pledge form packet or your local campaign coordinator for details.

Sample Endorsement Letter

To cut & paste into word document or email
visit <http://www.uwbucks.org/Tools.html>

Date

Dear (Employee name),

Once a year, each of us has a chance to make a difference in our community through our organization's United Way of Bucks County Campaign. XXX Company believes that we all have a responsibility to the community where we live and work. That's why XXX Company is a proud supporter of the Annual United Way workplace campaign.

We hope that you will play a part in creating a good life for all Bucks County residents. United Way focuses on three impact areas; education, income and health. These are the building blocks to a good life - a quality education that leads to a stable job, enough income to support a family through retirement, and good health.

XXX Company's campaign will run from (date to date). Please join me for the Campaign Kick-Off on (date). You'll learn about the many positive things happening in our community and gain a better understanding of what we as individuals and XXX employees can do to better the lives of our neighbors.

Your support helps make Bucks County a great place to live and work for everyone. By giving to United Way, you are investing in your community and supporting over 50 programs throughout Bucks County.

Let's continue XXX Company's tradition of giving and making a difference in the lives of residents throughout Bucks County!

Thank You!

Sincerely,

(NAME)
(CEO/President)

Sample Ideas for Voice Mail or E-mail

To cut & paste into word document or email
visit <http://www.uwbucks.org/Tools.html>

Voice and e-mail can be helpful year-round so employees get an idea of what United Way does throughout the year, not just at Campaign time.

WEEK 1 – ANNOUNCE THE CAMPAIGN

To: All Staff

Re: United Way of Bucks County

How would you like to make a difference in our community, and get a chance to win a \$5,000 Home Entertainment Package, a \$2,000 Gift Card, or a 100 second shopping spree?

On (DATE), we will be kicking off (COMPANY NAME)'s United Way Campaign. Last year, our community raised \$3,000,000 to help alleviate some of Bucks County's most pressing problems. This year, we're going to follow that with even more success! And by donating just \$6.00 per week, you are eligible to complete an entry to win a Home Entertainment Package valued at \$5,000, a \$2,000 Gift Card, and a 100 second shopping spree from McCaffrey's Markets. This is a great opportunity to get involved and change lives by investing in what matters in our community.

WEEK 2 OR 3 – ANNOUNCE THE CAMPAIGN KICKOFF

To: All Staff

Re: (COMPANY NAME) United Way of Bucks County Kickoff

You are invited to a (Event Name) as we kick off (COMPANY NAME)'S United Way Campaign

Date:

Time:

Location:

Don't miss this unique opportunity to hear how our contributions make it possible for United Way of Bucks County to help more people in more ways. We'll get to hear how contributions create a powerful caring force in our community. (NAME OF SPEAKER) will be joining us to share some success stories about United Way of Bucks County and the programs it funds. Plus, get details about how you can register to win a Home Entertainment Package valued at \$5,000, a \$2,000 Gift Card, or a 100 second shopping spree! Invest in what matters!



Sample Ideas for Voice Mail or E-mail (continued)

WEEK 2 OR 3 – UPDATE ON CAMPAIGN PROGRESS

Hey everyone! We've reached xx% of our goal! Thanks to you, last week's (EVENT NAME) was a huge success! (HIGHLIGHT STORY FROM EVENT) We were able to raise \$xxx.xx of our final goal of \$xxxxx. Don't forget, by donating just \$6.00 per week, you are eligible to complete an entry for to win a Home Entertainment Package valued at \$5,000, \$2,000 Gift Card, and a 100 second shopping spree from McCaffrey's. Please be sure to turn in your pledge cards and entry forms by (DATE).

WEEK 4 – FINAL AMOUNT RAISED/THANK YOU ANNOUNCEMENT

To: All Staff

Re: (COMPANY NAME)'s 2009 United Way Campaign Goal

We did it! I am thrilled to inform you that we met our campaign goal and raised (\$xxxxx) for United Way of Bucks County. Together, we are creating positive changes by investing in our community. We are part of a caring force that focuses on solutions to Bucks County's most pressing issues. We work together to build a strong community by providing community basics, nurturing children, developing youth, and empowering neighborhoods. Thank you for making a difference and investing in what matters.



Sample Thank You Letter

To cut & paste into word document or email
visit <http://www.uwbucks.org/Tools.html>

Date

Dear (Donor Name),

Thank you!

Bucks County is an extraordinary place to work and live. At (xxxx Company) we believe it is important to recognize the contributions that each of you make to the community. During our recent United Way campaign, you once again helped the people in our community who need it most. Thank you for your contributions and volunteer service!

We recognize that making a charitable gift is an important and personal decision. You can also feel confident that your United Way donation is being used effectively and efficiently while keeping Bucks County strong and prosperous.

All of us have a stake in advancing the common good. United Way is doing this by focusing on the building blocks of a good life – a quality education that leads to a stable job, enough income to support a family through retirement and good health. Thank you for your generous gift that makes so much possible for so many.

We at (XXX Company) are proud of the commitment each of you have made and we support and applaud your efforts.

Sincerely,

Your Company President
Company Name

(if applicable)
Your Union President
Labor Affiliation

Sample Campaign Group Meeting

(20 Minutes)

BEFORE THE MEETING...

Hang posters and send e-mail publicizing the meeting.

Prepare food and beverages, if possible.

Choose speakers for the meeting (schedule speakers through your United Way Representative).

THE DAY OF THE MEETING...

Have personalized pledge cards and pens ready for employees as they enter the room.

Get video equipment and tape ready to go and test ahead of time! (VHS, DVD, CD?).

Confirm CEO attendance for the meeting.

Display incentives.

SAMPLE AGENDA...

CEO/Labor Rep (where appropriate) welcomes all and endorses campaign	3 minutes
United Way video is shown	4 minutes
United Way Representative gives presentation	5 minutes
United Way agency speaker	5 minutes
Employee Campaign Coordinator (ECC) gives instructions and closing remarks	3 minutes

ASK EMPLOYEES... to return pledge forms at the end of the meeting or set a deadline.

Request that all employees return their pledge forms regardless of whether they are donating. Follow-up personally or ask an associate to contact employees who do not return their pledge cards or are unable to attend the meeting. Remember to publicize incentives and past winners.

THANK EMPLOYEES... for their past support on behalf of yourself, your company, and the United Way of Bucks County.





**United Way
of Bucks County**

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