



P.O. Box 673
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www.unitedwayhsc.org

LIVE UNITED

Give. Advocate. Volunteer.

Go online for More Information about the United Way at www.unitedwayhsc.org

Have questions, need additional Campaign Materials, Video or Speaker: Call 347.5195

8 Steps to a Successful
 United Way Campaign

*Campaign Coordinator
 Training Guide*

Questions?

How to conduct a 15 minute Campaign Drive

Campaign Promotional Items

<u>Activity</u>	<u>Responsibility</u>	<u>Time</u>
Distribute personalized pledge cards and other information as employees enter the room.	Campaign Coordinator or other committee member	2 minutes
Welcome employees and give United Way endorsement	CEO	2 minutes
Introduce Guest Speakers		
Show United Way video	United Way staff, Volunteer, Community Partner and/or Campaign Coordinator	10 minutes
Questions & Answers		
Ask employees to fill out pledge cards and turn them in	Campaign Coordinator or other committee member	1 minute

- Campaign Materials
 United Way Brochures, Pledge Cards, Report Envelopes
- Barometers (different sizes)
 Goal Setting Barometer with Thanks
- Posters
- Videos
 Campaign Video Time: 4 minutes (approx.)

To reserve any of these promotional items, call 347-5195.

1 Recruit A Campaign Committee

Suggested committee members include employees from all faces of your organization, from front line workers to management.

You

Last Year's Campaign Committee

Rep. from Management

Rep. from Production

Rep. from Human Resources

Rep. from Accounting

Rep. from PR/Communications

United Way Staff or Volunteer

2 Confirm CEO Support

Ask CEO to:

- Help determine Campaign objectives and goals for the company.
- Write a letter urging employees to contribute (see enclosed letter)
- Attend employee group meeting (Employee Drive) to make a personal statement of support
- Provide thank you recognition to Campaign Committee members, and write a thank you letter to all employees that gave (see enclosed letter)

3 Campaign Timetable

- Notify Campaign Committee and CEO of dates for United Way Campaign Kickoff and Day of Caring.
- Establish employee group meeting dates (Employee Drives to be conducted no later than October 15th). Plan a short, intensive campaign no more than 5-10 days.
- Schedule speakers from United Way Community Partners for Employee Drives, call United Way for help at 347-5195.
- Set a date to turn in your final report to United Way (prior to November 2nd).

4 Review Past Performance & Calculate Goal

Amount raised last year _____
of employees _____
of givers _____
% Participation (# givers divided by # employees)

Average gift (total \$'s divided by # givers)

Per capita gift (total \$'s divided by # employees)

Leadership Society givers _____
givers using payroll deduction _____

Identify any company changes since last year (new hires, layoffs, reorganization, etc.). Then consider the affect of any changes in developing goals for the Campaign.

Last year's \$ total + a 10% increase in \$'s =
\$ _____

How close is the per capita average to \$100?

givers needed to reach 50% participation

Leadership Society givers to reach 50% of givers

Set target for increasing % participation to

Set target for increasing # givers to

Set target for increasing average gift to

New average gift \$ _____ x # givers _____ =
\$ _____

Set target for Leadership Society givers: #'s
_____ \$'s _____

Set overall Goal \$ _____

5 Conduct an Employee Drive

Setting up an Employee Drive is easy. A United Way Staff or Volunteer can help in so many ways. They can help give the presentation along with a United Way Community Partner. This allows your employees to ask questions and hear from those providing services. Just let us know the date you need and please give two weeks notice, if possible.

Testimonials from employees who have either received help or volunteer with a Community Partner are very helpful when educating people about the importance of giving.

Obtain from United Way:

- Campaign Report Envelope
- Employee pledge cards
- United Way brochures
- United Way Campaign Video
- Barometers
- Posters

Sample Schedule:

- 1-2 weeks prior to date of Employee Drive send the CEO letter.
- Personalize pledge cards (employee's name and last year's gift)
- Conduct Employee Drive
 - Use speakers from United Way and Community Partners
 - Show United Way Campaign Video
- Encourage Fair Share and/or Leadership giving
- Conduct follow-up solicitation. Make sure every employee has been given an opportunity to contribute.

6 Publicize the Campaign

- Emails
- In employee publications
- In special displays around the workplace
- With the use of United Way Posters and Barometers
- Show the United Way Campaign Video
- Consider using incentives to encourage giving
- Encourage employees to visit www.unitedwayhcsc.org

7 Report Results to United Way

- Carefully complete the Campaign Report Envelope
- Put all cash, checks, credit cards and "bill me" pledge cards in the Campaign Report Envelope
- Give payroll deduction pledge cards to your payroll office (please make a copy for United Way and place in Campaign Report Envelope)
- Record # of givers at the bottom of the Campaign Report Envelope
- Return the Campaign Report Envelope to United Way
- Partial reports are encouraged

8 Wrap Up & Say Thanks

- Report final results and thank employees through department meetings, company newsletter or posted communications or email messages
- Distribute CEO's thank you letter to all employees (see enclosed letter)
- Recognize and thank your Campaign Committee
- Evaluate your campaign results and prepare recommendations for next year's Campaign Coordinator
- Attend the United Way Campaign Victory Luncheon