Steps to a Successful United Way Campaign

Congratulations on being selected as your company’s Employee Campaign Coordinator (ECC). Not only are you providing a tremendous service to your company, but your efforts will also make a difference — improving lives and building a stronger community. The United Way Campaign staff is ready to assist in any way possible. Please visit the Campaign HQ on our website: www.tauw.org or simply call 918-583-7171. We look forward to working together and the success it will bring.

PLANNING

MEET with CEO and Recruit your Campaign Committee

Your Campaign Committee should include employees from all divisions and levels as well as Loyal Contributors (anyone giving 10 years or more) at your organization.

CONFIRM Management Support and Ask your CEO to

☐ Help determine campaign objectives and goals to be an award-winning company (see award levels in this guide).
☐ Attend employee meetings to make a personal statement of support.
☐ Provide recognition to Campaign Committee members and write a thank you letter to all employees who participated in the campaign.
☐ Determine amount of corporate matching and donation.

ESTABLISH a Campaign Timetable

☐ Notify Campaign Committee and CEO of dates for Tulsa Area United Way events.
☐ Establish employee campaign group meeting dates.
☐ Schedule speakers from agencies for employee meetings or tours of agencies.
☐ Set campaign end date and schedule a time to submit your final report to TAUW.

RUNNING

ENGAGE Employees with Agency Tours and Speakers

A great way to engage employees in the United Way campaign is to offer tours of our partner agencies to see firsthand how your money makes an impact in the Tulsa area. Agency speakers allow your employees to hear from those providing services. Setting up a tour or speaker is easy. Just let your United Way staff member or Loaned Executive (LE) know the date(s) you prefer and the approximate number of employees participating in the tour. Please give two weeks notice if possible (contact us at 918-295-6677 to schedule a tour). Testimonials from employees who have either received assistance or volunteered at the Day of Caring or with an agency are very helpful when educating people about the importance of giving.

PUBLICIZE the Campaign

☐ Emails and employee publications
☐ United Way posters, brochures and materials (available online)
☐ Live United goal poster to keep track of your campaign’s progress
☐ Promotional items can be ordered at www.unitedwaystore.com.
☐ Incentives to encourage giving

CONDUCT Employee Campaign

☐ 1-2 weeks prior to employee campaign, send out the CEO letter (see sample CEO letter on www.tauw.org/campaignhq).
☐ Secure incentives for your campaign.
☐ Personalize pledge cards.
☐ Schedule and conduct employee meetings or an all-employee kickoff (see sample meeting agenda) with guest speakers (agency representatives, company employees who have used agency services, or TAUW staff).
☐ Show the campaign video.
☐ Conduct follow-up with employees to ensure every employee has been given the opportunity to contribute.
☐ Recognize loyal contributors/donors giving to TAUW more than 10 years.

INFORM Employees about Leadership Giving

Leadership Giving and membership in the Alexis de Tocqueville Society exemplify the spirit that makes our community a great place to live and work.

☐ Ask your CEO to personally lead an informational briefing or send a letter explaining Leadership Giving to all employees before the regular campaign begins.
☐ Identify employees whose current giving is close to leadership level, and encourage them to contribute at the next level, using incentives whenever possible.

WRAPPING UP

REPORT Results to the United Way

☐ Please call TAUW with any questions.
☐ Complete and sign the Campaign Report (directions on Campaign Report Return Envelope). You may complete the online form at www.tauw.org/campaignreport. Remember to print and sign the Campaign Report.
☐ Give the “Payroll Copy” of the Payroll Deduction Pledge Cards to your payroll office for deductions to begin.
☐ Place cash/checks and pledge cards in the appropriate envelope/bags, then place in the Campaign Report Return Envelope.
☐ If pledge cards are not enclosed, submit the Leaders in Giving members form or email a spreadsheet (template at www.tauw.org/campaignhq).
☐ Seal Campaign Report Return Envelope and staple two signed copies of the Campaign Report to the front. Retain one copy for your records.
☐ Request any needed recognition items at www.tauw.org.
☐ Return your Campaign Report Return Envelope to your TAUW staff or Loaned Executive (LE).
☐ Evaluate your campaign results and prepare recommendations for next year’s ECC.

Say THANK YOU

☐ Report final results and thank employees through department meetings, company newsletter, “Thank You” poster and/or email messages.
☐ Distribute CEO thank you letter to all employees and donors.
☐ Provide recognition items to all Leadership giving donors and Loyal Contributors.
☐ Recognize and thank your Campaign Committee.
☐ Evaluate your campaign results and prepare recommendations for next year’s ECC.

Thank you for all your hard work!
WIN UNITED
GUIDELINES FOR WINNING A TULSA AREA UNITED WAY CAMPAIGN AWARD:

MAJOR AWARDS
Williams Summit Leadership Award - This is the highest award given by the Tulsa Area United Way and is presented to the company best exemplifying what it means to Live United. The company winning the award will meet at least four (4) of the following nine (9) criteria:

- Use of at least a majority of the Steps to a Successful Campaign
- Strong volunteer engagement:
  - volunteers/volunteer projects at company
  - involvement in Day of Caring
  - LE program participation
- Corporate matching program or corporate gift
- 5% increase in at least one area of the campaign:
  - overall total
  - participation
  - Leadership Giving donors
  - Leader Development dollars

Small Business Award - Best small business campaign (between 5 and 50 employees)

Leadership Giving Award - Growth in Leadership Giving program

Trailblazer Award - Best Trailblazer campaign

Ignite! Award - Best first-time campaign

Illuminate! Award - Best campaign from a partner agency

OTHER AWARDS
Best of the Best
- Employee per capita giving (EPC): $200 or more
- Employee participation: 75% or more
- Corporate matching program or corporate gift

Award of Excellence
- EPC of $185 or more

Gold Award
- EPC of $125

Silver Award
- EPC of $124 - $184

Bronze Award
- EPC of $89 - $123

Achievement Award
- EPC of $54 - $88

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Important Campaign Event Dates

September 6, 2013  Day of Caring in the Eugene Field Neighborhood
September 13, 2013  Campaign Kickoff at the MidFirst Bank Backyard Bowl
November 1, 2013  Campaign Reports requested to be submitted to TAUW
November 14, 2013  Unite!
February 18, 2014  Annual Awards Luncheon

LISA DEVINS
Employee Campaign Coordinator,
Kimberly-Clark Corporation
www.tauw.org/lisa

CAMPAIGN RESOURCES
The following supplies are available for your use. Contact your United Way Staff person to obtain any of these for your campaign.

Campaign Brochure
This is a brochure that provides information about TAUW, how United Way works, how you can become more involved in United Way and information about our partner agencies.

Pledge Forms
Printed pledge forms are used during general employee campaigns. These can be personalized with a label or employees can complete personal information.

Goal Posters
These posters are useful for keeping your co-workers updated on your progress. They can be personalized with your company logo or photos of employees.

Campaign Video
This is a video presentation of people in our community who have been helped by your contributions as well as those who support the United Way.

Campaign Report and Report Envelope
This report and envelope are used for you to return all pledge forms and other materials with the total amount raised in your campaign.

Campaign Planning Handbook
This handbook is a detailed reference guide for planning and executing a successful United Way workplace campaign. It includes sample letters, special event suggestions and best practice tips. It can be found on our website at www.tauw.org/campaignHQ or you may request a copy from your staff person.

Website and Campaign Toolkit
Visit the Campaign HQ section on the United Way website at www.tauw.org/campaignHQ for more resources, including PDFs of campaign materials and campaign ideas. Visit www.tauw.org to learn more about TAUW, register for upcoming events, find contact information and learn more about speakers, programs and tours. TAUW staff or Loaned Executives are available to speak to your employee group. They can also arrange for a speaker from an agency or a tour of one of our agencies. Contact your TAUW staff person for details.

Your Staff Person: ________________________________________________

ADDITIONAL CAMPAIGN INFORMATION
All organizations that achieve a 10% increase or more with a minimum of a $1,000 campaign will be listed in a special ad in the Tulsa World following the campaign.

How to Conduct a 20-Minute Campaign Meeting

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RESPONSIBILITY</th>
<th>TIME</th>
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<tbody>
<tr>
<td>Distribute pledge cards</td>
<td>Employee Campaign Coordinator</td>
<td>4 min</td>
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<td>and other information</td>
<td>(ECC) or other committee member</td>
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<td>as employees enter the</td>
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<td>room</td>
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<tr>
<td>Welcome employees and</td>
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<td>3 min</td>
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<tr>
<td>give the United</td>
<td>(ECC) or other company rep</td>
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<td>Way endorsement</td>
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<tr>
<td>Introduce and show the</td>
<td>ECC</td>
<td>5 min</td>
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<td>United Way video</td>
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<tr>
<td>Have a guest speaker Q &amp; A TAUW staff, agency rep, ECC or other company rep</td>
<td>6 min</td>
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<td>Ask employees to complete</td>
<td>ECC or other committee member</td>
<td>2 min</td>
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<td>pledge cards and turn them in</td>
<td></td>
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LIVE UNITED
AT WORK
Planning a Great Campaign

1430 S. Boulder • P.O. Box 1859 Tulsa, OK 74101 • 918-583-7171 • www.tauw.org