

10 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 are ready to assist however possible. Please visit the **Campaign Coordinators' Resource Center** on our website: www.tauw.org or simply call 918-583-7171. We look forward to working together and the success it will bring.

1 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) of your organization.

2 CONFIRM Senior Management Support and Ask your CEO to:

- Help determine campaign objectives and goals to be an award-winning company
- Support recruitment of Campaign Committee
- Appoint a Leadership Giving Coordinator
- Write a letter encouraging employees to join him or her in contributing (see sample letter)
- 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

3 REVIEW Past Performance and Calculate Goal

Amount raised last year _____ % of participation _____
 # of employees _____ Average gift _____
 # of givers _____ # of Leadership Givers _____

% of campaign raised by Leadership Givers _____
 What are your company's strengths? _____

In what areas could your company improve? _____

Identify any company changes since last year (new hires, reorganization, layoffs, etc.). Consider the effect of any changes in developing goals for this year's campaign.

4 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 turn in your final report to TAUW

5 ENGAGE Employees with Agency Tours and Speakers

A great way to engage employees in the United Way campaign is to offer tours of United Way partner agencies to see firsthand how their money makes an impact in the Tulsa area.

Agency speakers also 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 need and how many employees will be going on the tour. Please give two weeks notice, if possible.

Testimonials from employees who have either received help or volunteered with an agency are very helpful when educating people about the importance of giving.

6 PUBLICIZE the Campaign

- Emails and employee publications
- United Way posters and materials (available online)
- Live United goal poster to keep track of your campaign's progress
- Promotional items can be ordered from United Way Worldwide at unitedwaystore.com
- Incentives to encourage giving
- Promote Leadership Giving - an annual gift of \$500 or more, only \$20.84 when paid twice a month
- Encourage employees to visit the Tulsa Area United Way website at www.tauw.org

7 CONDUCT Employee Campaign

- 1-2 weeks prior to date of employee campaign, send out the CEO letter (See sample CEO letter)
- Secure incentives from local restaurants, museums, etc.
- Personalize pledge cards
- Schedule and conduct employee meetings or an all-employee kickoff (See sample meeting agenda)
- Show the campaign video
- Use guest speakers (agency representatives, company employees who have used agency services, TAUW staff)
- Encourage Leadership Giving and share gift amount information with all employees
- Conduct follow-up with employees, to ensure every employee has been given the opportunity to contribute

8 INFORM Employees about Leadership Giving

Leadership Giving through the Key Club and the Tocqueville Society exemplifies the spirit that makes our community a great place to live and work.

Leadership Givers receive recognition and are listed in the Leaders in Giving Registry.

Bronze:	\$500–\$749	Gold:	\$2,500–\$4,999
Bronze Plus:	\$750–\$999	Platinum:	\$5,000–\$9,999
Silver:	\$1,000–\$1,499	Tocqueville Society:	\$10,000 or more
Silver Plus:	\$1,500–\$2,499		

- Ask the CEO to personally lead an informational briefing or send a letter explaining Leadership Giving to all employees before the regular campaign starts
- Be sure to let them know about all the levels and if possible, offer an incentive or prize to employees who pledge early
- Identify employees whose current giving level is close to the next leadership level, and encourage them to contribute at the next level, using incentives whenever possible

9 REPORT Results to the United Way

- Complete the Leadership Giving Roster and request any needed recognition items from the United Way at www.tauw.org
- Carefully complete the Campaign Report. You can complete the form online at www.tauw.org/campaignreport
- Be sure to note the number of employees, billing information and frequency of employee payroll payments
- Put all cash, checks, TAUW pledge copies, credit card forms and special event money in the marked envelopes and place in the Report Envelope
- Put the Leadership Giving Roster in the envelope
- Retain the third copy of the Campaign Report and give a copy of payroll pledge cards to your payroll office; staple the first two copies to the front of the Campaign Report Envelope
- Seal the Campaign Report Envelope and return to your United Way staff person or to your Loaned Executive. Call TAUW with any questions

NOTE: Be sure to have employees keep a copy of the pledge card for their tax records, give the second copy to your payroll department so that deductions will begin next year and return the third copy to UW in an effort to acknowledge and recognize our donors.

10 WRAP UP and Say Thanks

- 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 Leadership Giving 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

TAUW thanks you for all your hard work!

ADDITIONAL CAMPAIGN INFORMATION



All organizations that achieve a 10% increase or more with a minimum of a \$1,000 campaign and turn in their reports to the Tulsa Area United Way by October 28 will be listed in a special ad in the *Tulsa World* following the campaign.

How to Conduct a 20 Minute Campaign Meeting

ACTIVITY	RESPONSIBILITY	TIME
Distribute pledge cards and other information as employees enter the room	Employee Campaign Coordinator (ECC) or other committee member	4 minutes
Welcome the employees and give the United Way endorsement	CEO	3 minutes
Introduce and show the United Way video	ECC	5 minutes
Have a guest speaker Q & A	TAUW staff, agency rep, ECC or other company rep	6 minutes
Ask employees to fill out pledge cards and turn them in	ECC or other committee member	2 minutes

SAMPLE CEO LETTER

Dear (Company Name) Employee,

The 2011 United Way Campaign is gearing up and we will kick off our employee campaign on (DATE). (ECC's name) and (his/her) team have worked hard to make this a great campaign and we're looking forward to not only having some fun, but more importantly, making a difference in the lives of our friends and neighbors. The campaign will end on (DATE), and you will be receiving details on the campaign activities soon.

Hundreds of thousands of people this year will need the valuable assistance from the programs provided by the 61 Tulsa Area United Way (TAUW) partner agencies. These agencies deliver the three building blocks to a better life: education, financial stability and health/safety. We all have a stake in the health of this community. Your contributions, combined with many others, make a huge difference in numerous lives. By giving to the Tulsa Area United Way, you meet the needs of many.

Please consider a gift to the Tulsa Area United Way as your part in making our community a better place to live. Your donation amount is a personal decision. TAUW's guideline giving is one hour's pay per month or 1% of annual salary, but any amount is appreciated. Keep in mind that we allow you to spread your gift throughout the year with the convenient option of payroll deduction. (IF APPLICABLE) We also match your gift, so everything you give goes further!

Please review the enclosed brochure about the agencies and services of the Tulsa Area United Way. I hope you will join me in supporting the 2011 United Way campaign. There is no better way to help more people in need than by giving through the United Way.

Thank you,
Your CEO

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:



You can nominate your company for this award. Visit www.tauw.org, Campaign Coordinators' Resource Center Awards for a submission form.

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

Small Business Award - Given to a company with between 5 and 50 employees (that is not a subsidiary of a larger local company). The winner of this award will have company leadership in their campaign, volunteer involvement and use the Steps to a Successful Campaign. Winners of this award must also have a campaign increase from last year.

Leadership Giving Award - Award given to recognize an established Leadership Giving program. Program usually includes incentives, management support to give and internal acknowledgement or recognition. Must have a percentage increase in Key Club members to receive this award.

Trailblazer Award - Award will be given for best Trailblazer campaign. The winning company will have at least a 10% increase, use the Steps to a Successful Campaign and participate in Trailblazer activities.

Ignite! Award - This award is for the best first time campaign. The winner will have shown company leadership, volunteer involvement and used the Steps to a Successful Campaign.

Illuminate! Award - Award given for the best campaign from a partner agency, including use of the Steps to a Successful Campaign.

OTHER AWARDS:

Best of the Best

- Employee per capita giving (EPC): \$250 or more
- Campaign increase over last year: 5%
- Employee participation: 75% or more
- Implementation of 8 of 10 steps listed

Award of Excellence

- EPC of \$185 or more
- Employee participation: 75% or more

Gold Award

- EPC of \$125

Silver Award

- EPC of \$124 - \$90

Bronze Award

- EPC of \$89 - \$55

Achievement Award

- EPC of \$54 - \$45

Important Campaign Event Dates

August 12 - Trailblazer 5K Run & Block Party

September 9 - Day of Caring and Campaign Kickoff

October 1 - **NEW!** Luchapalooza

November 10 - Unite!

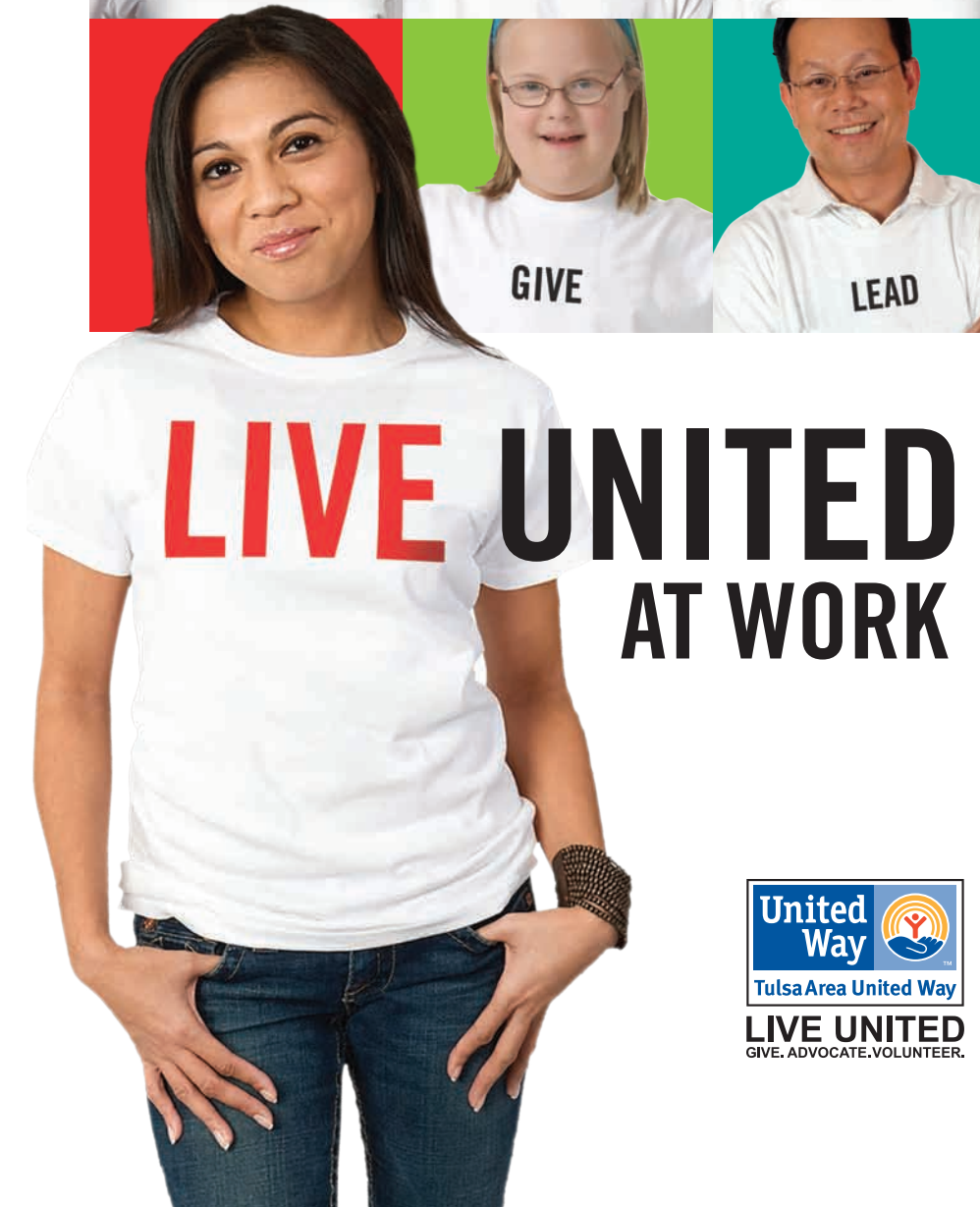


LIVE UNITED
GIVE. ADVOCATE. VOLUNTEER.

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Tulsa Area United Way

2011 Employee Campaign Coordinator Training Guide



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