

IMPORTANT CAMPAIGN DATES

CAMPAIGN EVENTS

- Kickoff September 6, 2016
 - Reserve a table for your company.
 - Bring your committee & your CEO!
- Final Report Meeting November 10, 2016
- Awards Celebration January 27, 2017

REPORTING CAMPAIGN RESULTS TO UNITED WAY

- Campaign Report Envelope due by October 28, 2016

QUESTIONS? HERE'S WHO TO CALL

Your Loaned Executive or UW Staff:

Name _____ Phone _____

Tours/Video/Speakers.....467-3400

For additional campaign materials or other questions:

Call 467-3519

GO ONLINE FOR MORE INFORMATION @ www.unitedwaygc.org

TOGETHER, WE'RE BUILDING A CYCLE OF SUCCESS.

LIVE UNITED



United Way of
Greenville County

SAMPLE LETTER FROM CEO*

Dear Colleagues,

Greenville County is a wonderful place to live and work because we're a community that truly cares. Each year, our United Way campaign gives us the opportunity to express that caring spirit in a way that is both convenient and effective.

Because of your generosity, each year United Way programs and services are able to directly impact the lives of more than 100,000 people in Greenville County. That's an amazing number and one that wouldn't be possible without our support.

While your gift to United Way helps meet the immediate food, shelter, health and safety needs of those in crisis, this is not a bandage approach.

By strategically aligning donor contributions with programs focused on school readiness, high school graduation and financial stability, United Way is breaking the cycle of poverty and building a cycle of success for all in our community.

We're seeing great progress, but we can't stop now. I'm asking you to join me in increasing your gift this year, or contributing at the Fair Share level, to help our neighbors in need. Every contribution, regardless of the amount, changes lives in Greenville County.

I am proud to work with so many people who care deeply about our community. It's what makes [COMPANY NAME] a great company and a great place to work. We choose to give to United Way because we care about building a brighter future. Let's all continue our commitment this year by giving generously.

Sincerely,
CEO
[COMPANY NAME]

* download letter from www.unitedwaygc.org

HOW TO CONDUCT A 30-MINUTE CAMPAIGN MEETING

Activity	Responsibility	Time
Distribute personalized pledge cards and other information as employees enter the room	CC or other committee member	5 minutes
Welcome employees and give United Way endorsement	CEO	2 minutes
Introduce and show the United Way video	CC	8 minutes
Have an agency speaker	UW	5 minutes
Have United Way staff or LE speak	UW	3 minutes
Questions & Answers		2 minutes
Ask employees to fill out pledge cards and turn them in	CC or other committee member	5 minutes
		30 Minutes

BE AN AWARD WINNER!!!

Award Criteria

1. 10% increase in employee giving
2. \$100 or more employee per capita
3. 50% or more employee participation
4. One or more Palmetto Society members (\$1,000+)
5. 50% of contributors are Fair Share givers [Fair Share = 1% or more of annual salary for salaried employees, or one hour of pay per month for hourly employees.]

To be considered for awards, companies must have 2 or more employees and a campaign of \$500 or more.

Awards

- Chairman's Award: meet any four of the award criteria
- Campaign Award of Excellence: meet any two of the award criteria
- Advancement Award: 25% or more increase in employee giving and/or participation
- Premiere Award: first-time campaigns

Awards Celebration
January 26, 2017

United Way of Greenville County • 105 Edinburgh Court • Greenville, SC 29607
(864) 467-3333 • FAX (864) 467-3535 • www.unitedwaygc.org

2016 CAMPAIGN COORDINATOR TRAINING GUIDE

10 STEPS

to a Successful
United Way Campaign



United Way
of Greenville County

1 Recruit a Campaign Committee

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

You

Next year's CC

Last year's CC

Palmetto Society Chair

Representatives from:

Management

Production

Human Resources

Payroll

PR/Communications

UW Staff or Loaned Executive

2 Confirm CEO Support

Ask CEO to:

- Appoint next year's CC to assist or co-chair.
- Appoint Palmetto Society Chair to solicit \$1,000+ contributors.
- Help determine campaign objectives and goals to be an award-winning company. (criteria on page 5)
- Write a letter encouraging employees to contribute.
- Attend employee group meetings to make a personal statement of support.
- Provide thank you recognition to Campaign Committee members, and write a thank you letter to all employees.

3 Review Past Performance & Set Goal

Meet with your CEO and campaign committee to determine 2016 goal using last year's stats on the history sheet as a basis for comparison.

- Amount Raised in 2015 _____
- Number of employees _____
- Number of donors _____
- % Participation (Number of donors divided by number of employees) _____
- Average gift (Total \$'s divided by number of donors) _____
- Number of Fair Share donors _____
- Number of Palmetto Society donors _____
- Last year's \$ total + 10% increase in \$'s = \$ _____

Suggestions for improving your campaign results by 10%:

- Set target for increasing participation to _____% by increasing # of donors to _____
- Set target for increasing average gift to \$ _____ by adding:
 - Fair Share donors (for salaried, 1% of annual salary; for hourly, 1 hour of pay per month)
 - Palmetto Society donors (\$1,000+)
- Set target for increasing Palmetto Society donors to _____
- Overall Goal for 2016 \$ _____

Things to consider:

- a. What are your company's strengths?
- b. In what areas could your company improve?
- c. Identify any company changes since last year (new hires, layoffs, reorganizations, etc.).

4 Campaign Timetable

- Notify Campaign Committee and CEO of dates for United Way community **Kickoff** and **Final Report** meetings.

- Establish employee campaign group **meeting dates**. Plan a short, intensive campaign no more than 5-10 working days.

- Establish date for **Palmetto Society** special effort with top management members and prospects.

- Schedule **speakers** from United Way for employee meetings or tours of funded programs.

- Set date to turn in your final report envelope to United Way (prior to 10/30/16).

5 Take Tours, Use Agency Speakers

One of the best ways to get employees interested in and excited about the United Way campaign is to let them hear and see firsthand how their money helps right here at home. Use a partner agency/United Way speaker, attend a partner agency tour, and/or use testimonials.

- Setting up a speaker and/or tour:
 - **Identify the focus area** you would like to hear from or tour, as well as a 2nd choice option.
 - **For a speaker**, determine the date, time, and number of employees that will attend your campaign meeting.
 - **For a tour**, determine the preferred date, time, and number of employees you would like to tour a partner agency (2 weeks notice if possible.)
 - **Contact United Way to arrange details** either via www.unitedwaygc.org, the Speaker/Tour Coordinator (467-3400), your Loaned Executive, or your United Way staff contact. United Way will send you a confirmation for your files.

- Using Testimonials**
 - Identify employees who have received help or volunteered at an agency.
 - Ask them to share their experience at employee meeting.

6 Ways To Publicize Your Campaign

- Communicate campaign dates and employee meeting dates
- E-mails
- Employee publications
- Special displays around the workplace
- United Way posters and materials
- Goal posters to keep track of progress
- Campaign video
- Promote incentives
- Use special promotional items (pins, mugs, etc.) that can be ordered from United Way store at www.unitedwaystore.com
- Use the United Way Mascot, Sir Thanksalot, as part of your campaign—all UW to schedule
- Utilize campaign tools on website:

www.unitedwaygc.org

Campaign Promotional Materials

- "THANKS FOR CARING" BANNERS
Plastic - (indoor/outdoor) 4' x 8'
- NOMADIC DISPLAY:
Displaying United Way information/brochures.

Two sizes available:
8'h x 10'w x 1.5'd (trade show size) or
49"h x 39"w (tabletop size)
- VIDEOS
Campaign Video
Time: 5:00 (approx.)
- SIR THANKSALOT STAND-UP CUTOUT (5' tall)
- SIR THANKSALOT COSTUME
- UNITED WAY STORE:
1.800.772.0008
www.unitedwaystore.com
(for pins, mugs, etc.)

To reserve any of these promotional items, call 467-3400.

7 Conduct Employee Campaign

Supplies from United Way:

- Campaign Report envelope
- Special Event Report envelope
- Employee pledge cards
- eWay (electronic giving to UW). Contact UW for more details.
- Donor Designation Forms
- United Way brochures
- Video
- Posters
- Goal Posters
- Palmetto Society Supplies & Report Form
- Thank You Cards
- United Way Sticky Pins

- 1 - 2 weeks prior to date of employee campaign, send the CEO letter (see sample on panel 5).
- Secure incentives to encourage giving.
- Personalize pledge cards.
- Conduct employee meetings.
- Show the campaign video.
- Use guest speakers (LE's, partner agency reps., company employees who have been on tours, UW Staff).
- Encourage Fair Share giving or other suggested giving guide.
- Conduct follow-up solicitation. Make sure every employee has been given an opportunity to contribute.
- Encourage employees to visit website for more information about United Way's ongoing work in the community.

8 Conduct Palmetto Society Special Effort

- Schedule a Palmetto Society meeting, breakfast, or lunch for top management, and include members and prospects.
- Consider holding meeting at a partner agency to see donor dollars at work firsthand.
- Schedule Palmetto Society speaker/partner agency speaker for Palmetto Society meeting.
- Develop a list of prospects.
- Consider Leadership Group prospects (African American Leadership Greenville, Women's Leadership, Young Philanthropists-40 and under, YP20s).
- Follow up (if possible) with \$500+ contributors age 29 and under to make sure they are aware of the YP20s opportunity.
- Ask CEO to write a letter encouraging prospects and members to attend Palmetto Society meeting.
- Develop a plan for one-on-one follow-up with those that did and did not attend the meeting.
- Develop a method of gathering Palmetto Society pledge cards, and use report forms to convey all information to United Way.
- Provide thank you recognition to all Palmetto Society givers.
- Encourage Palmetto Society Chair to attend training.

Supplies from United Way:

- Personalized Palmetto Society Pledge Cards for all current members and prospects, brochures and rosters.
- Call 467-3509 for additional Palmetto Society supplies.

10 Wrap Up AND Say Thanks

- Report final results and thank employees through department meetings, company newsletter, posted communications, or e-mail messages.
- Distribute CEO's thank you letter to all employees. Sample letters can be found on the United Way website.

9 Report Results To United Way

- Carefully complete the Employee Campaign Report Envelope.
- Complete the Palmetto Society Report Form, and include in the Employee Campaign Report Envelope.
- Put all cash, checks, credit card, stock information, and "bill me" pledge cards in the Campaign Report Envelope.
- Put Donor Choice Forms in the Campaign Report Envelope. Be sure each Donor Choice Form is filled out correctly with amount donated and signature.
- Download the Thank You Coupon report form from www.unitedwaygc.org, and email to Thankyou@unitedwaygc.org.
- Include a list of all donors with their donation amount and e-mail address, if possible.
- Complete Special Event Report Envelope if you had fundraisers.
- Return the Campaign Report Envelope to United Way or to your Loaned Executive (partial reports are encouraged).
- Give payroll deduction pledge cards to your payroll office.
- Ensure all donors keep pledge card receipt for tax purposes.

- Thank all donors with United Way stickers and thank you cards.
- Recognize and thank your Campaign Committee.
- Evaluate your campaign results, and prepare recommendations for next year's CC.
- Join us for the United Way Campaign Final Report meeting and Awards Celebration.