

IMPORTANT CAMPAIGN DATES

CAMPAIGN EVENTS

- Kickoff September 12, 2018
 - Reserve a table for your company.
 - Bring your committee & your CEO!

- Campaign Report Envelope due by October 31, 2018

- Awards Celebration Date TBD 2019

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 @ UNITEDWAYGC.ORG

**OUR COMMUNITY IS WORTH FIGHTING FOR.
LIVE UNITED**



United Way
of Greenville County

ELECTRONIC CAMPAIGN CHECKLIST FOR CAMPAIGN COORDINATOR

3 WEEKS PRIOR

- Communicate your Kickoff Date to your United Way Staff Contact.
- Submit Employee Roster in Excel Format. (This spreadsheet will be emailed to you to properly fill in the columns.)

2 WEEKS PRIOR

- Set a Campaign Goal, then communicate your goal to United Way staff so we can properly update the thermometer on the site.
- Provide Company Logo—only applicable if setting up first time campaign or have a new logo (A high quality official corporate logo; File Type: .png (preferred file type), .gif or .jpg accepted file types; Logo Size: 40 pixels high x 330 pixels wide)
- Get approval of communication plan (if applicable) from CEO, then submit back to UW Staff contact

****These emails for communication plan will be provided by the Relationship Manager****

1 WEEK PRIOR

- Check your Email Server. (Please check with your IT Department that the IP address 198.37.149.123 is added to your existing WHITELIST. If this is not done the kickoff email may be blocked.
- Test Email Communication with United Way and walk through Workplace Giving site.

HOW TO CONDUCT A 30-MINUTE CAMPAIGN MEETING

Activity	Responsibility	Time
Welcome employees and give United Way endorsement	CEO	5 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	5 minutes
Questions & Answers		5 minutes
Discuss online pledge form	CC	2 minutes
		30 Minutes

BE AN AWARD WINNER!!!

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

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% or more donors give at a Community Builder level or above (\$250 and up)
6. One of the top 25 largest employee campaigns

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
- Premier Award: first-time campaigns

Awards Celebration

Date TBD 2019

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

2018 ELECTRONIC CAMPAIGN PLANNING GUIDE

10 STEPS

to a Successful
United Way Campaign

**UNITED WE FIGHT.
UNITED WE WIN.**



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 (This year's CC)

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 an email 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 email to all employees.

3 Review Past Performance & Set Goal

Meet with your CEO and campaign committee to determine 2018 goal using last year's stats on the history sheet as a basis for comparison.

- Amount Raised in 2017 _____
 - 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 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:
 - Community Builders (\$250 - \$999)
 - Palmetto Society donors (\$1,000+)
 - Set target for increasing Palmetto Society donors to _____
 - Overall Goal for 2018 \$ _____

Things to consider:

- a. What are your company's strengths?
- b. In what ways could your company's campaign improve?
- c. Identify any company changes since last year (new hires, layoffs, reorganizations, etc.).
- d. Consider the Awards criteria listed on page 5.

4 Campaign Timetable

- Notify Campaign Committee and CEO of dates for United Way **CAMPAIGN KICKOFF** and **AWARDS** meetings.
- Review CC checklist. (see on back panel)
- Establish employee campaign group **MEETING DATES**. Plan a short, intentional 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 and/or tours of funded programs.
- Set date to turn in your final report envelope to United Way (prior to 10/31/18).

5 Take Tours and 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, and ask them to share their experience at employee meeting.

6 Ways To Promote 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—call UW to schedule
- Utilize campaign tools on website:

unitedwaygc.org

7 Conduct Employee Campaign

SUPPLIES FROM UNITED WAY ONLINE:

- Electronic Campaign Report Envelope
- Special Event Report Envelope
- United Way brochures
- Posters
- Goal posters

- 1 - 2 weeks prior to date of employee campaign, send communication plan.
- Secure incentives to encourage giving.
- 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 Community Builder 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.
- 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 or email 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.
- Provide thank you recognition to all Palmetto Society givers.
- Encourage Palmetto Society Chair to attend training.

9 Report Results To United Way

- Carefully complete the Electronic Campaign Report Envelope.
- Complete cash and check form (include all cash, check and paper pledge cards in envelope, if applicable).
- Complete Special Event Report Envelope if you had fundraisers.
- Return the Electronic Campaign Report Envelope to United Way or to your Loaned Executive (partial reports are encouraged).

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 email to all employees.
- 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.

Campaign Promotional Materials

- "THANKS FOR CARING" BANNERS
Plastic - (indoor/outdoor) 4' x 8'
 - NOMADIC DISPLAY:
Displaying United Way information/brochures.
 - SIR THANKSALOT STAND-UP CUTOUT (5' tall)
 - SIR THANKSALOT COSTUME
 - VIDEOS
Campaign Video
Time: 5:00 (approx.)
 - UNITED WAY STORE:
1.800.772.0008
unitedwaystore.com
(for pins, mugs, etc.)
- Two sizes available:
8'h x 10'w x 1.5'd (trade show size) or
49"h x 39"w (tabletop size)

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