

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

SAMPLE LETTER FROM CEO*

Dear Colleagues,

We see the successes of Greenville County in national news nearly every week as a popular destination for visitors and a hub for new development. But there is another side to the community we call home—one that creates a harsh reality for thousands of families who live it every day.

One in five families in Greenville County, nearly 70,000 people, are living in poverty. Put into perspective, that equates to the entire population of the City of Greenville. This challenge affects not only our neighbors, who cannot meet the basic financial needs to provide for their families, but also their children—the future of our community.

You can personally impact the lives of those individuals and families by contributing to United Way of Greenville County's annual campaign. United Way fights for the basic needs, education and financial stability of every person in our community. Support the vision for a Cycle of Success in Greenville County by joining me in making a donation.

Our contributions will support more than 100 local programs benefiting real people in our community with food, safe shelter, healthcare, education, mentorships, job training and much more. United Way of Greenville County takes every dollar given and leverages it to create \$2.25 in community impact.

Together, we can build a better future for Greenville County. I am proud to work with so many people who care deeply about our neighbors and the success of Greenville County. It's what makes this such a great place to work and live. Let's all continue our commitment this year by showing our community what it means to us.

Sincerely,
CEO
[COMPANY NAME]

* download letter from 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	<u>5 minutes</u>
		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 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 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 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.
- 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.

Campaign Promotional Materials

- "THANKS FOR CARING" BANNERS
Plastic - (indoor/outdoor) 4' x 8'
- SIR THANKSALOT STAND-UP CUTOUT (5' tall)
- VIDEOS Campaign Video Time: 5:00 (approx.)
- NOMADIC DISPLAY: Displaying United Way information/brochures.
- SIR THANKSALOT COSTUME
- 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.

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:

- Campaign Report Envelope
- Special Event Report Envelope
- Employee pledge cards
- United Way brochures
- Posters
- Goal posters
- Palmetto Society supplies and report form
- 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 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 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.

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.
- Download the Live United Appreciation Card report form from unitedwaygc.org, fill it out and email it 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.