



United Way
of Central Ohio



TABLE OF CONTENTS

1. EMPLOYEE CAMPAIGN COORDINATORS: A KEY LINK	2
2. CAMPAIGN HOW-TO: THE OVERVIEW.....	3
3. CAMPAIGN HOW-TO: THE DETAILS	7
a. Key Strategies	
b. Making the Ask	
c. Pledge Collection Options	
d. Wrapping Up/Thank You	

1. EMPLOYEE CAMPAIGN COORDINATORS: A KEY LINK

Congratulations! As a leader in your organization, you've been selected as a United Way Campaign Coordinator. We know you have a lot to offer, and we welcome your leadership and input in our 2019 campaign!

YOUR MISSION:

The Campaign Coordinator is a critical link between United Way and your co-workers. Through your communication, organization and leadership skills, you provide your co-workers with the opportunity to fight poverty in central Ohio.

CAMPAIGN COORDINATOR TASKS:

Conducting a United Way campaign should be a fun and rewarding experience. United Way of Central Ohio provides many tools and resources to assist you as you plan and execute your campaign. The resources and tips provided in this guide will help you plan an enjoyable, meaningful and successful campaign.

As a Campaign Coordinator, you will:

- Work closely with your CEO and United Way representative to develop an effective campaign plan
- Recruit and coordinate a volunteer committee to assist you
- Coordinate your company's kickoff and recognition events
- Promote the campaign throughout the company
- Encourage leadership giving in your campaign
- Encourage volunteerism among your co-workers
- Educate your co-workers about United Way
- Attend United Way kickoff and victory events
- Invite everyone to give
- Make a gift yourself
- Thank your donors and volunteers
- Evaluate and make recommendations for next year
- Prepare and submit your company's Celebration of Excellence awards application

Let your enthusiasm and creativity shine through, and your efforts will pay off. It takes people like you, who go above and beyond, to make this campaign successful. Thank you for joining us!

2. CAMPAIGN HOW-TO: THE OVERVIEW



2019 Donor Brochure

The donor brochure is one of the most effective ways to communicate the United Way message to employees at your organization, because every employee receives one.

STORIES are effective ways to share how donor gifts help United Way fight poverty in our community. You will recognize some of these local individuals in our selection of success story videos.

POVERTY in central Ohio remains high, despite a strong economy.

YES, I WANT TO GIVE

360 South Third Street • Columbus, Ohio 43215-5485
614.227.2700 • fightpovertycbus.org



1 MY INFORMATION

Empl. I.D.: _____ Prefix: Mr. Ms. Mrs. Dr. Other: _____
First Name: _____ M.I.: _____ Last Name: _____
Suffix: Jr. Sr. Other: _____ Employer: _____
Home Address: _____
City: _____ State: _____ Zip: _____
Personal Email: _____
With your personal email address, we save paper and money keeping you updated on the impact of your gifts. We do not disclose personal information to outside entities.

2 MY GIFT TO THE COMMUNITY

EASY PAYROLL DEDUCTION

My gift: \$ _____ per pay period 12 24 26 52 pay periods =

OR

PAY NOW by attaching check made out to United Way or pay with cash.

Check #: _____ Check Date: ____/____/____ Cash

I WOULD LIKE TO MAKE PAYMENTS: Monthly Quarterly One Time

We will bill you and you may pay by credit card, check or stock transfer.
Your donation must total \$50 or more. Home address is required above.

First billing date (if not 1/1/2020): ____/____/____

MY TOTAL GIFT
FOR THE YEAR IS

\$ _____

THANK YOU
for helping fight poverty
in our community!

SIGNATURE (required): _____ Date: ____/____/____

Contributions to United Way are tax-deductible. Please make a copy for your records. We do not provide goods or services as whole or partial consideration for contributions.

3 STRATEGICALLY INVEST MY GIFT (OPTIONAL)

COMMUNITY IMPACT FUND: I want to make the MOST impact on my community.

Annual Amount: \$ _____ (Consider giving \$365, just \$1 a day. By giving and living UNITED 365, you'll make change happen.)

IMPACT AREAS: I want to invest in an area of special concern to me:

Basic Needs \$ _____ Good Jobs \$ _____
 Strong Neighborhoods \$ _____ Student Success \$ _____

Restrict a portion of my gift to a 501(c)(3) organization or other United Way as noted. (minimum agency designation is \$25)

Required: name, address & tax ID number (see guidestar.org) of organization	Annual Amount:
_____	\$ _____
_____	\$ _____

Designation Guidelines: 501(c)(3) organizations and other United Ways are eligible for designations. If agency information is below \$25, is incomplete, if we are unable to identify the agency and/or the agency's payment check remains uncashed without response beyond 180 days, your gift will be redirected to the Community Impact Fund. Religious organizations that do not provide direct health and human services are not eligible to receive designations. United Way does not provide oversight of non-United Way partner organizations. Donor name and address will be provided to designated agency(s) unless donor has opted to be anonymous. United Way of Central Ohio's cost recovery fee is currently 10 percent. Designations are subject to cost recovery fees in accordance with United Way Worldwide Membership Standards.

4 UNITE WITH YOUR COMMUNITY

Sign me up for one or more United Way affinity groups (Check all that apply):

- Leaders Circle (see back of pledge card)
- INCL (ages 22-30 and \$250+ gift to Community Impact Fund)
- Key Club (African American and \$1,000+ gift)
- Pride United (LGBTQ/Ally and \$1,000+ gift)
- Women's Leadership Council (must designate \$1,000 to E³ Program in "optional" section)
- Young Leadership Group (under 46 and \$2,500+ gift)
Step-up options available for some groups.

I/we have given to United Way for 10 or more years and am a Loyal Contributor. Since (year, if known) _____

To be recognized for combined household contribution, please print:

Name of Spouse/Partner: _____

Employer of Spouse/Partner: _____

I/we would like to be listed for recognition purposes as follows: _____

I/we wish to remain anonymous; name will not be used for recognition purposes.

FOR UNITED WAY USE ONLY: Organization #: _____ Account #: _____

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DONATIONS can be made by cash, check or payroll deduction. To be billed later, a home address is required.

A GIFT TO THE COMMUNITY IMPACT FUND is the most effective investment a donor can make. This fund supports our network of more than 80 nonprofit partners.

Remind your employees to **SIGN AND DATE!**

8 STEPS TO BUILDING A SUCCESSFUL CAMPAIGN

Implementing these basic steps will help to ensure a successful United Way campaign. They are based on past experiences of organizations that have had exemplary campaign results.

BEFORE THE CAMPAIGN

1. RECRUIT A CAMPAIGN COMMITTEE

You don't have to do it alone! Having representatives from each department can be very effective. This team can help in all stages of the campaign: planning, promoting awareness, and distributing and collecting materials.

Strategies:

- Form a Campaign Committee with leaders from all facets and levels of the organization. Recruit people who are energetic, organized and well-liked by their peers.
- Invite your United Way Relationship Manager to meet with you and your committee to discuss your goals and objectives.

2. PLAN AHEAD

Work with your United Way Relationship Manager to set goals, discuss ways to communicate the message, create a buzz and schedule fun activities that add momentum to your campaign.

Strategies:

- Review your company's campaign history with your United Way Relationship Manager, including the total amount raised, participation rate, average gift and the strategies used last year.
- Decide with your Relationship Manager between ePledge or paper pledge forms.
- Set beginning and end dates for your campaign.
- Review this year's new donor brochure and other informational materials.
- Set campaign goals and publicize them throughout your organization.
- Develop incentives to make influential changes such as early return of pledge cards, first-time donors, using payroll deduction and increased giving.
- Schedule events on the company calendar.

3. ENLIST LEADERSHIP SUPPORT

Leaders lead the way! The support of your president/CEO, management team and/or labor leaders is crucial. By personally endorsing the campaign, members of your senior management team demonstrate their commitment both to your organization's campaign and United Way.

Strategies:

- Ask the president/CEO to hold a United Way educational meeting with his/her leadership team.
- Enlist leaders to speak at kickoff meetings, and send emails or letters in support of the campaign.
- Plan events around the CEO's calendar whenever possible or call on other senior leaders to represent the president/CEO at events.

DURING THE CAMPAIGN

4. EDUCATE EMPLOYEES ABOUT UNITED WAY'S WORK

One of the most important elements of a campaign is to educate employees about United Way of Central Ohio's work. Some people relate to personal stories, while others want to hear about facts, figures and the return on investment. When donors understand the needs in the community and how United Way is addressing these needs, they feel personally connected to the campaign.

Strategies:

- Arrange for representatives from United Way and a United Way agency to present at staff meetings.
- Invite United Way to a meeting of your senior management team to discuss the work of United Way and address any questions they have.
- Distribute United Way donor brochures and materials, hang posters in common areas, and send campaign countdown emails.

5. KICK OFF YOUR CAMPAIGN

Campaign kickoffs can be informative and FUN! Kickoffs can be elaborate (with costumes and scripts!) or as easy as snacks in a break room. Do what works best for your organization. By gathering your group together in one place for the kickoff, each person feels a part of the overall goal.

Strategies:

- Invite senior management and United Way to join you to make the ask.
- Provide food at your kickoff to drive attendance.
- Include your president/CEO in kickoff events and communications.
- Use United Way of Central Ohio's marketing materials during the kickoff to create awareness.

THE EMPLOYEE GROUP MEETING Group meetings are the most effective way to reach all employees and make the most efficient use of time. It can take from 5 to 20 minutes to convey key messages. Here's an example of best practices for a 20-minute meeting:

Item	Presenter	Time	Purpose
Opening Remarks	Employee Campaign Coordinator	1 minute	Welcomes everyone and states the reason for the meeting.
CEO Endorsement	CEO/Key Executive	1 minute	Demonstrates the support of the organization and its leaders.
Campaign Video	Introduced by the ECC or United Way Representative	5 minutes	Thanks previous donors and sets the tone and focus.
United Way Overview	United Way Representative	5 minutes	Shares the scope of the needs and illustrates United Way's unique approaches.
Success Story	Ambassador or United Way Representative	5 minutes	Provides a concrete example of a community need fulfilled.
Ask for Donations	United Way Representative	2 minutes	Solicits the support of individual donors.
Closing and Thanks	United Way Representative	1 minute	Expresses gratitude for their time and their participation.

GROUP MEETING BEST PRACTICES

- Whenever possible, incorporate the United Way presentation into an existing staff meeting.
- As employees enter the meeting, distribute personalized pledge cards with donor brochures. Employees should turn them in before the end of the meeting, and the employee's signature is required for payroll deduction.
- If employees miss the meeting, be sure that a member of your campaign team visits them for a one-on-one touchpoint.
- Discuss with your Relationship Manager the ways to adapt group meetings to any environment.

6. ENCOURAGE LEADERSHIP GIVING

United Way of Central Ohio offers a number of recognition levels and giving groups for those who lead by example through their giving, and for those who want to connect with others who are inspired by what they can accomplish together. (See pledge cards for Leadership Giving group descriptions.)

Leadership Giving provides the fastest way to help increase total dollars raised in the campaign, and the networking opportunities offered within giving and affinity groups boost your organization's presence in the community.

Strategies:

- Include Leadership Giving brochures in information packets.
- Encourage Leader's Circle as an easy and effective way for all donors to make an investment in United Way based on a percentage of their salary.
- Encourage Community Builders to those who give at the leadership level but do not qualify for a United Way affinity group.
- Promote the benefits of membership in affinity groups.
- Publicly recognize the people who gave at these levels last year. Others will want to know more about how to get involved.
- Recognize individuals who give at leadership levels through special recognition events, personalized letters from senior management or exclusive incentives.

AFTER THE CAMPAIGN

7. ANNOUNCE RESULTS AND SHOW APPRECIATION

Plan ways to finalize your campaign, celebrate your accomplishments and thank employees for their participation and contributions. People will have a more positive feeling about their donation, and receiving appreciation increases the likeliness that they'll participate next year.

- Strategies:**
- Announce campaign results via email or during staff meetings.
 - Create opportunities to say thank you.
 - Show how one "small" gift combined with the entire company's will create a big impact.
 - Recognize your own work by submitting a Celebration of Excellence award application.

8. CONTINUE THE MOMENTUM WITH YEAR-ROUND UNITED WAY COMMUNICATION

Collaborate with United Way to provide year-round educational programs to implement throughout your workplace (newsletters, intranet, etc.). Work with your United Way Representative for more information on how to promote awareness about United Way's work. Year-round communication helps educate employees on the impact of their gift and how integral they are to the work of United Way.

- Strategies:**
- Publish noteworthy information in company newsletters or intranet.
 - Host Lunch and Learn sessions (coordinated by United Way).
 - Organize small group tours of United Way-funded programs (coordinated by United Way).

3. HOW-TO: THE DETAILS

KEY STRATEGIES FOR GROWING YOUR UNITED WAY CAMPAIGN

OVERALL Aim for 100% education by enhancing year-round education and communication. Aim for 100% participation by including pledge cards indicating \$0 or “no gift.” This ensures that people have considered a gift to the United Way campaign and made their decision. It does not mean they should be forced to give.*

TO INCREASE GIVING (AVERAGE GIFT)

- Segment your employee population to determine affinity group eligibility
- Set and use suggested giving guidelines (i.e., two hours pay per month)
- Make specific asks at various income levels
- Structure incentives so that they are based on giving levels
- Establish a competition between departments based on total dollars raised
- Invite United Way speakers to employee meetings
- Communicate increasing community needs to individual donors

TO INCREASE PARTICIPATION (# OF GIVERS)

- Communicate senior management’s support – ask the president or CEO to write a letter or email of support, attend group meetings, and make a personal gift prior to the start of the campaign
- Assemble a campaign committee with representation from all levels and departments
- Take campaign committee on agency tours prior to campaign time
- Ask ALL employees to contribute
- Enhance year-round education and engagement with regular messaging and planned volunteer opportunities, Lunch and Learns, and more

** The Board of Trustees of United Way of Central Ohio believes that the most responsive contributors are those who have the opportunity to become informed and involved. A well-planned campaign with an effective communications program, conducted by committed volunteers, will ensure responsive contributors. Giving is a personal matter and decision; no form of coercion is acceptable to United Way of Central Ohio.*

MAKING THE “ASK”

The number one reason why people don’t give is because they aren’t asked.

It’s so easy to do! There’s a number of ways you can go about doing it. Let United Way help in making the ask.

EDUCATE EMPLOYEES United Way of Central Ohio has many resources available to help you educate your employees and run an effective campaign. Campaign materials, video, speakers, agency tours and volunteer projects are excellent ways to show how United Way dollars are working in our community. Talk to your Relationship Manager or visit liveunitedcentralohio.org/workplace-campaigns for details.

VOLUNTEER UNITED Join thousands of community volunteers representing local corporations and organizations as they work at United Way agencies, community sites and schools to make a stronger community. Our new platform at volunteerunitedcbus.org engages volunteers in completing meaningful projects throughout central Ohio. Choosing a group project is a great opportunity for your team to see the real work of United Way and can be used as a team-building activity. For more information, visit volunteerunitedcbus.org.

PLEDGE COLLECTION OPTIONS

1. EPLEDGE SYSTEM

Make your United Way campaign run more smoothly by replacing paper pledge cards with the online ePledge system. The ePledge system allows employees to pledge privately and securely from their desks, or even from home. And, United Way of Central Ohio provides the system at no charge. Additional benefits include:

- A personalized pledge process
- Minimal time spent collecting pledge cards, creating reports and following up on outstanding pledges
- Real-time access to campaign progress or results

Your Relationship Manager can arrange for a demonstration, assist you with gathering information, arrange for training or answer questions you may have. You'll want to begin discussions at least 6-8 weeks before your campaign begins. Contributor information should be provided to United Way approximately four weeks prior to kickoff.

2. CUSTOMIZED PLEDGE CARDS

For certain campaigns we can personalize pledge cards. Each employee gets their own individual pledge card with their name. Early planning helps to address any questions you may have, well in advance of your campaign. Depending on the size of your company, we will need the data file 2-3 weeks in advance of your due date.

CONGRATULATIONS! YOUR CAMPAIGN IS COMPLETE

You will want to have a formal “wrap up” of your campaign, announcing the results and thanking participants

- Announce campaign results and accomplishments through newsletters, intranet, email, voicemail or a memo.
- Blanket bulletin boards and lunch rooms with “thank you” messages.
- Post photos internally or on social media of employees participating in campaign events.
- Include a special message with payroll stuffers.
- Recognize Leadership Givers.

THANK YOU

The two simple words “thank you” not only show appreciation, but also set the tone for year-round communication and next year’s campaign. Contributors will receive an acknowledgement from United Way, but you can also build more support for future campaigns by acknowledging the work of your campaign committee, as well as each employee who contributes.

- Ask the president/CEO to host an appreciation breakfast/lunch for the campaign committee.
- Create certificates of appreciation for each member of your committee.
- Give event tickets to each campaign committee member.
- Ask senior management to send thank you notes to all donors.
- Sponsor a “thank you” breakfast, luncheon or reception for campaign participants.
- Distribute company pens, mugs, certificates, awards, buttons or note pads to volunteers and contributors.
- Acknowledge donors at an all-employee meeting

NOTES

TOGETHER, WE CAN FIGHT POVERTY.

Together, we have the power to fight poverty in central Ohio by giving people the opportunities they need to succeed. And it starts with YOU. We would like to thank all the Employee Campaign Coordinators for their hard work and commitment to making our community a better place for all of us to live, work and raise a family.

GIVE.....

Giving to United Way of Central Ohio's Community Impact Fund is the easiest and most powerful way to fight poverty and build a stronger community. Each individual gift adds up.

CONNECT.....

Make sure your Relationship Manager has your correct email address so you will receive valuable ECC information to help you maximize your campaign efforts. Get and stay connected with us on Twitter, Instagram and Facebook by going to fightpovertybus.org.

SHARE.....

Share great moments from your company's United Way campaign activities and year-round community involvement, tagging United Way of Central Ohio and [#fightpovertybus](https://twitter.com/fightpovertybus).

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614.227.2700 fightpovertybus.org

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