



## Before the Campaign

1. Meet with United Way (UW) campaign staff to review prior year's giving and develop a campaign strategy.
2. Meet with your Chief Executive Officer
3. Establish campaign goal
4. Establish a committee (if needed)
5. Determine the type of campaign best suited for your company.
  - One on one solicitations
  - Group Meetings
  - Combination
  - Leadership/Management
  - Retiree mailing
6. Establish campaign timetable
7. Publicize campaign
8. Personalize campaign
9. Schedule trainings for solicitors (UW staff can arrange).
10. Tour UW funded programs (UW staff can arrange).
11. Attend UW campaign coordinator training.

## During the Campaign

1. Kick off your campaign
2. Conduct leadership giving campaign with CEO involvement
3. Schedule employees meetings (with CEO if possible) with UW staff.
4. Schedule funded program tours (UW staff can arrange).
5. Follow-up with employees unable to attend
6. Issue progress report to your UW staff person and your employees.

## After the campaign

1. Tabulate results and submit Campaign Report Envelope and required forms to UW.
2. Thank your committee, solicitors and employees who participated.
3. Draft a letter to be sent from the CEO to recognize the committee members.
4. Evaluate your company campaign strengths and weaknesses and make recommendations for next year's campaign coordinator.
5. Pat yourself on the back for a ***JOB WELL DONE!***



## Put the **FUN** in **FUN**draising

### INCENTIVES

For the employees who make a first-time gift or increase an existing gift, have a drawing for:

- Paid time off
- Jeans day/casual dress day
- Reserved parking spot/Rental of prime parking spots.
- Sleep-in passes
- CEO car wash
- Extra lunch time
- Weekend getaway at a hotel or resort
- Gift cards

### Special Events

Set a price to participate or attend and give away prizes.

- Throw a pie/Dunk your boss.
- Breakfast bash/pizza party/root beer floats
- White elephant sale/on-line auction
- Typing contest
- Baby pictures contest
- Email bingo
- Collect loose change around the office
- Auction gift baskets from each department
- Lunchtime movie with popcorn
- Indoor golf course
- Book fair-sell staff donated books CDs and videos
- Ugly earring/tie /sweater contest
- Employee cookbook sale
- Save it or Shave it- most dollars collected jar gets to decide
- Crazy hat- employees pay \$1.00 to make someone else wear it.
- Bake sale
- Office Olympics
- Office treasure hunt
- Chili Cook-off

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# Employee Campaign COORDINATOR Training GUIDE

U N I T E D W A Y O F T H E B I G B E N D



ALEXIS PHILLIPS  
Rogers, Gunter, Vaughn  
Insurance



# 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 of the Big Bend (UWBB)** Campaign staff are ready to assist however possible. Please visit the Employee Campaign Coordinators' Campaign Central on our website: [www.uwbb.org](http://www.uwbb.org) or simply call Karen Frazee, 850-487-9807. We look forward to working together and the success it will bring.



## 1 CEO CONTACT

Involve your CEO in all initial planning. Discuss budget, corporate gifts, and CEO involvement throughout the campaign.



## 2 RECRUIT

Recruit a committee to help, set your timeline & budget, and design your campaign.

Be creative. Identify your campaign activities. Delegate tasks to your committee.



## 3 REFLECT

Evaluate past campaign performances and calculate a goal. Your United Way rep can help, especially when it comes to incorporating new ideas.



## 4 SET GOALS

Discuss the hard numbers and where you want to grow your campaign. Create nonmonetary volunteer opportunities.

**Tip:** *Creating volunteer opportunities encourages everyone to get involved. Your United Way rep can connect you with opportunities that align with your company's mission.*



## 10 HAVE FUN

Engage your employees with fun and meaningful activities, prizes and volunteer opportunities.



# 10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN



## 5 PUBLICIZE

Share how when and where to pledge and incentivize giving.

Order Live United shirts they create a great photo opt.

Utilize and distribute United Way campaign materials

## 9 REPORT & THANK

Announce your final results to your organization and United Way in a timely manner and thank everyone involved.



## 8 ASK

Include new hires upon arrival, current employees, leadership and retirees in the asking process by providing them with pledge forms.



## 7 LEADERSHIP GIVING

Recognize leadership gifts and discuss CEO matched donation.



**Tip:** *Successful campaigns have heavy involvement from leadership, setting an example from the top down.*



## 6 CONDUCT CAMPAIGN

Distribute campaign materials and host a United Way Speaker.

Create learning opportunity through educational activities.