



Company Coordinator



United Way of Lee County, Inc.
www.UnitedWayofLeeCounty.com

LIVE UNITED

You are United Way!



Thank you for being a Coordinator for the United Way of Lee County.

Coordinators help distribute campaign material, organize events and advocate for United Way. They are essential to the success of campaigns and we cannot say “thank you” enough!

Being a Coordinator is an effective way to support your community, become more connected to people throughout your office, play a leadership role in the workplace, network with other people in our community through our training and thank you events, and get a closer look at the needs and resources within our community.

Whether this is your first time as a Coordinator, or your tenth, this handbook is a tool to help get the most out of your campaign. Follow the Ten Steps for A Successful Campaign and you are guaranteed a great campaign! Thanks again and don’t forget...*you are United Way.*

*“We make a living by what we get,
we make a life by what we give.”*

-Winston Churchill

10 Steps for a Successful Campaign:

1. **Secure top level management support.** *Get the bigwigs involved!*
2. **Establish a Campaign Committee to help.** *TEAM—Together Everyone Achieves More.*
3. **Arrange for support and materials from United Way.** *We are here to serve you!*
4. **Get to know your local United Way.** *The more you know, the better the campaign.*
5. **Set Clear Goals.** *You CAN make a difference in the community!*
6. **Develop a FUN campaign plan!** *Campaigns are a great way to bring people together for a great cause.*
7. **Advocate for United Way and the benefits of giving.** *Spread the word—and the good will.*
8. **Implement the campaign.** *Enjoy your campaign!*
9. **Report your results.** *Share your successes.*
10. **Say thank you and celebrate!** *Thank you for a job well done!*



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1. Secure top level management support

The best way to begin and ensure a successful campaign is to secure the support of company leadership.

- Meet with the CEO/President/Manager to get their support.
- Ask your CEO to encourage donors by providing an incentive of matching dollars on employee contributions.
- Encourage your CEO to talk at an all-staff meeting with a United Way representative about the benefits of giving through the campaign.

Being a Community Leader through Leadership Giving

Leadership Giving begins with a minimum contribution of \$1,000. A gift of \$10,000 or more makes you eligible to join the Alexis de Tocqueville Society. Your gift is acknowledged in our Leadership Booklet each year, and you will also receive a quarterly newsletter highlighting the impact your generous gift makes here in Lee County.

2. Establish a Campaign Committee for Help

By building a campaign team, you will get more out of this experience. Your campaign will be more effective if you have the support of a group.

- Remember the benefits of TEAM— Together Everyone Accomplishes More!
- Find a volunteer to represent each of the various departments within your company.
- Clearly define the role of your volunteers and how much time they will be committing to the campaign.

What makes a great Committee Member?

- Enthusiasm
- Familiarity with & belief in United Way
- Willing to set an example by being a donor
- Well respected

3. Arrange for support and materials from United Way

Your United Way Staff and volunteers are a resource and support for you during the campaign. Our role is to help you make sure your campaign is a success. Here are a few ways that we can help you:

- Provide campaign material, information and support
- Present to employees during campaign
- Educate your committee about United Way
- Arrange for agency speakers

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Contact the United Way staff at any time. We are here to help you!

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4. Get to know your local United Way

Our Mission Statement:

To increase the organized capacity of people to care for one another. One of the ways that we do this in our community is by generating and applying the necessary resources to meet the needs of the community, recognizing that meeting basic human needs should be the overriding consideration in all decisions.

Our Impact Areas:

- Helping Children & Youth Succeed
- Promoting Health and Independence
- Strengthening Families and Community
- Assisting in Time of Critical Need or Crisis

5. Set clear goals

By setting clear goals your campaign will have measurable results and will have a clear focus. United Way likes to focus on a donor goal, because we know that no gift is too small when it is combined with the gifts of others.

Last year XYZ Company had 65 employees and 35 of them donated; that was 53.8% participation rate. This year XYZ Company wants a 15% increase in donors. That means they want to have 40 employees participate.

How to figure out percentages:

$$\frac{35}{\text{Number of donors}} \div \frac{65}{\text{Number of potential donors}} \times 100 = \frac{53.8}{\text{Percentage of participation}} \%$$
$$\frac{35}{\text{Past year donors/dollars}} \times \frac{115}{100 + \text{percentage of increase (ex. } 100 + 15 (\%) = 115)}} \times 100 = \frac{40}{\text{This year's goal for donors/dollars}}$$



6. Develop a FUN campaign plan

Good planning is vital to your success. Once you have established your goals, you can develop a timeline and plan for the type of campaign and activities that best suit your organization.

An example of a timeline:

Collaboration—Meet with upper management; Recruit committee members; Talk with United Way to set dates and get materials.

Goal Setting—Meet with Committee to assess last year’s campaign results; Set goals based on desired outcomes.

Planning—Decide on which special events to try this year; Outline the campaign week; Assign Committee responsibilities.

Advertise—Hang posters; Send emails; Announce campaign dates.

Campaign—Run campaign and events; Hold presentation by inviting United Way volunteer/staff and CEO to address staff.

Wrap up— “Thank You”s to staff; Submit final results to United Way; Celebrate!

Campaign FUN-raising Ideas

Silent Auction or Ticket Auction—Local businesses will often donate items or game-day tickets for your organization to include in an auction.

Raffles—Smaller items can be raffled off or grouped in gift baskets to be raffled.

Garage Sale—Employees can donate items to be sold in a “garage sale” with proceeds going towards campaign goals.

Chili Cook-off, Bake Sale or Tailgate Tastes—Incorporating food is often a good way to entice employees to give. Make it a contest between departments to encourage participation.

Penny Wars—Creating competition always increases participation and change wars are an easy way. The cost of losing can be having to dress in costume, wear an ugly tie, or bring coffee for the winning department—be creative and adjust to your workplace environment.

Dunking Booth—Who wouldn’t want to dunk their supervisor in a big water tank?!

Campaign Themes—Sports, Rodeo, Mardi Gras, etc. or Casual Day for United Way, giving employees the opportunity to step away from the daily work “décor” can help increase energy around campaign.

There are MANY more ideas available. If you are interested in holding a company fundraiser to increase giving, please contact the Campaign Manager to discuss options for your workplace.

7. Advocate for United Way and the benefits of giving

Promoting the campaign will both encourage involvement and interest, while also educating your co-workers.

- Use your company newsletter, bulletin boards and/or staff meetings to remind people about the campaign
- Send bi-weekly emails to promote the campaign
- Display posters in common areas with campaign information
- Insert a United Way brochure into employees paychecks

8. Implement the campaign with a 100% ask

The number one reason that people do not give is because they have not been asked. Make it a priority to educate and provide the opportunity to give for every employee. To accomplish a 100% ask:

- Make yourself available to answer people's questions or concerns
- Arrange a presentation with an agency speaker
- Make people aware that no gift is too small
- Provide information about how a donor's donation can impact the community

Want to Get People Interested in Giving? Try Incentives!

- Prime Parking Spaces—Perhaps with a sign saying “United Way Star Employee” or the CEO's reserved spot for a week of the employee's choice.
- Corporate dollar-for-dollar match
- Time off—vacation day, a half-day, “well” day
- Lunch with the CEO
- Gift certificates to stores, restaurants, salons
- Free night at a local hotel for a “mini-getaway”
- Tickets to sporting/music events

9. Report your results

Now that your campaign has wrapped up, it is important to report your results to your co-workers and your United Way.

- Attend weekly turn-in meetings at United Way!
- Provide your United Way with all employee pledge cards (or copies) as well as any cash or check donations or special event money
- Publish overall campaign results in your newsletter, on United Way posters, at staff meetings, etc.

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10. Say thank you and celebrate!

Make sure the donors at your organization feel appreciated and recognized. Be sure to celebrate your business' support of the community. Don't forget to involve your United Way. This is a great opportunity for them to personally thank your employees for their generosity.

- Hold a thank you event for employees
- Send a thank you letter from the CEO
- Send a personalized thank you card
- Put together goody bags to thank your Committee



THANK YOU!

Awards

United Way of Lee County likes to acknowledge the many businesses that excel in their support of United Way. We want your business to be one of our award winners. The awards provide great public recognition, instill employee pride for the campaign, and can be a great way to frame your company goals.

Outstanding NEW Campaign Award—Media Appreciation Award
Leadership in Business Award—Leadership in Industry Award—Leadership in Institutions Award
TOP GIVER Award—Volunteer of the Year Award

What “\$1” can buy for United Way of Lee County agencies.

\$1 Monthly Gift = approximately 1 candy bar

Lee County Youth Development Center: Provides 12 Home Alone Safety booklets for 4th grade students.

\$2 Monthly Gift = the approximate cost of 1 energy drink

Rape Counselors of East AL: Provides a victim with clothing to wear home from the hospital.

\$3 Monthly Gift = average cost of a specialty coffee

Red Cross: Provides food and shelter to a client for one day.

\$6 Monthly Gift = approximate cost of a foot long sub sandwich

Auburn Day Care: Provides supplemental day care expenses for one child per month.

Less than \$2 per week = average cost for a 20oz soda

Food Bank of East AL: Enables distribution of more than 700 meals to people in need.

Contact us for a more complete list of items purchased by agencies with United Way funding.

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FAQs

The following questions have been raised by volunteers and prospective donors alike. Reading over these questions will give you a comfortable knowledge base to address concerns, questions, and objections from a prospect.

Why should I give to United Way?

When you give to United Way, you can help provide solutions to the most critical human care issues in our community. You become part of a coordinated, community-wide effort that brings about the changes that matter most where you live and work. United Way of Lee County maximizes your gift by combining your contributions with others and strategically investing in results-driven programs and initiatives. By giving hope to kids, families, seniors and people with disabilities, you can help our entire community. Plus, with the ease of payroll deduction, you can help others and improve the quality of life in our community without the financial challenge of a one-time donation.

Is United Way a national or local organization?

United Way of Lee County is a local autonomous non-profit organization. Like more than 1,400 United Ways across the country, we are governed by a local volunteer Board of Directors. United Way of Lee County pays nominal dues to United Way of America in exchange for important cost-saving services such as staff training, community research information, campaign products and ongoing consultation.

Why does United Way of Lee County have administrative costs?

In the business of community impact, United Way of Lee County incurs costs for fundraising, marketing, year-round support of our fundraising and agency partners, community investment and common business operations such as accounting, human resources and overall organizational management. As careful stewards of our donors' investments in our community, we operate our organization with the utmost efficiency and effectiveness. Around ninety-one cents of every dollar is invested in local programs and initiatives that improve lives and deliver results, making us one of the most efficient non-profits in the nation.

Why should I give to United Way instead of giving directly to an agency?

There are several reasons why supporting United Way is the best way to help the most people in our community. These reasons include:

- By investing in United Way of Lee County, you help provide solutions to the most critical human care needs of our community. You don't have to choose which need is most important, United Way addresses them all.
- Community volunteers carefully review each United Way funded program on an annual basis. Their oversight ensures agencies adhere to sound fiscal policies and that your contribution is invested in programs that do the most good.
- Giving through United Way reduces costly and time-consuming fund-raising efforts for the agencies providing programs. This enables them to better spend their time helping people who really need help.
- When you give through your workplace campaign, your gift can be spread out over the course of a year through payroll deduction, making it easier for you to support the human care needs of our community.
- When you give to United Way of Lee County, your gift is invested with the contributions of others to help provide a continuum of care for those most in need. This enables you to partner with us in creating sustained changes in community conditions that improve the lives of individuals throughout our area.

Does United Way fund abortion counseling or abortions?

No agencies funded by the United Way of Lee County are in any way involved with offering abortion counseling or abortions.

Are my contributions used locally to benefit this community?

Yes. Ninety-nine cents of every dollar contributed to the United Way of Lee County stays here in the county.

Is my United Way contribution tax deductible?

Yes, your contribution is tax deductible.

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Who really benefits from United Way money?

We all do. Take a look around your office or workplace...it's almost certain that several people there use United Way agencies services. (Anyone you know have a child in the Boy Scouts or Girl Scouts? Know anyone who has ever needed blood? Remember the Red Cross and Salvation Army aid to the Alabama flood and tornado victims?) Last year in Lee County, over 100,000 services were provided by United Way supported agencies.

Who does United Way of Lee County serve?

All services of United Way-supported agencies are open to every citizen of this area without regard to race, gender, age, etc.

What are the advantages to a "united" campaign?

One campaign for many agencies helps eliminate the confusion and irritation for the donor that would result from many separate solicitations; it also conserves time and energy of the volunteer campaign workers who put their efforts into one campaign rather than several. Campaign costs are also an important factor. A "united" campaign can be conducted for about four cents on every dollar raised whereas even well-run separate campaigns cost 15-20 cents for each dollar raised. A "united" campaign puts more of the contributor's money to work in the agencies for which it was given.

Can I choose which agency gets my contribution?

A donor may designate all or part of their gift to a United Way-supported agency. This money will be sent along with other designations to that agency as "first dollars" of its approved allocation. If the total dollars designated to an agency exceed the amount of its allocation, the agency will still receive all designated dollars.

How is the campaign goal set?

The goal is based on the proven needs of the agencies that provide the services in our community. Highly qualified and concerned local volunteers represent you, they evaluate the budgets of our United Way agencies and our support costs, and they study priority needs and other available funding sources to recommend how funds will be allocated. These actions, plus allowances for uncollectible pledges and the economy form the basis for a campaign goal.

What does your United Way do in addition to raising funds?

The United Way of Lee County, Inc. is involved in a variety of other functions. United Way researches and plans for future community-wide needs, recruits and trains volunteers, reviews United Way agencies and community needs to direct funds where they are needed most, provides information and referral services to help link people with the services they need, responds and adapts to changing social conditions and human needs, helps solve community health and human care problems and serves as a resource for the Lee County area. Our United Way frequently serves as a catalyst in bringing local resources together to meet emerging needs. One example of this type of activity is the establishment of a Community Market in Lee County.

How do agencies become a part of United Way?

First, an agency must request to become a member. Its operation and services are then studied in detail by the volunteers of the Fund Distribution Committee. Among other factors, the agency must meet each of the following standards:

- In operation for at least two years;
- Performs a needed, not already provided, service of preventive, remedial, or educational value in the field of health, social services or recreation;
- Be certified by the Internal Revenue Service as a non-profit agency;
- Be under the guidance of a local Board of Directors;
- Does not perform a service for which public (tax supported) agencies have accepted the responsibility and have made adequate provision;
- Keep complete and regular accounts and have its books audited annually;
- The agency agrees to participate in community planning efforts in order to coordinate its work with the work of other agencies.

Campaign Planning Checklist

<u><i>Before Campaign</i></u>	Team Member Responsible	Target Date	Activity Complete
1. Recruit a diverse Campaign Team	_____	_____	<input type="checkbox"/>
2. Learn about United Way of Lee County & Live United at a United Way training session	_____	_____	<input type="checkbox"/>
3. Meet with your United Way representative	_____	_____	<input type="checkbox"/>
4. Train your Campaign Team / Set up other planning Meetings	_____	_____	<input type="checkbox"/>
5. Review past campaign results	_____	_____	<input type="checkbox"/>
6. Determine areas of potential	_____	_____	<input type="checkbox"/>
7. Identify strengths and weaknesses	_____	_____	<input type="checkbox"/>
8. Determine campaign needs (budget, etc.)	_____	_____	<input type="checkbox"/>
9. Develop a plan	_____	_____	<input type="checkbox"/>
10. Meet with CEO for support/approval & request for Visibility & support during the campaign	_____	_____	<input type="checkbox"/>
11. Set the Goal	_____	_____	<input type="checkbox"/>
12. Establish a campaign timeline	_____	_____	<input type="checkbox"/>
13. Schedule agency tours and speakers	_____	_____	<input type="checkbox"/>
14. Create special themes and fun-filled events	_____	_____	<input type="checkbox"/>
15. Launch a PR campaign to communicate with employees	_____	_____	<input type="checkbox"/>
16. Personalize pledge cards if applicable	_____	_____	<input type="checkbox"/>
17. Send letter from CEO/Labor/Dept. Head endorsing United Way	_____	_____	<input type="checkbox"/>

Campaign Planning Checklist

During Campaign

	Team Member Responsible	Target Date	Activity Complete
18. Conduct Leadership Solicitation (meeting or face to face)	_____	_____	<input type="checkbox"/>
19. Solicitor Training (for companies that require department or location solicitors)	_____	_____	<input type="checkbox"/>
20. Campaign Kick-off & special events	_____	_____	<input type="checkbox"/>
21. Hold employee meetings—Tell the United Way story & make the ask	_____	_____	<input type="checkbox"/>
22. Conduct one-on-one solicitation	_____	_____	<input type="checkbox"/>
23. ALL PLEDGE CARDS IN	_____	_____	<input type="checkbox"/>

After Campaign

	Team Member Responsible	Target Date	Activity Complete
24. Gather all pledge cards	_____	_____	<input type="checkbox"/>
25. Give Payroll Deduction copies to payroll department	_____	_____	<input type="checkbox"/>
26. Total campaign results excluding anything previously reported at United Way	_____	_____	<input type="checkbox"/>
27. Complete United Way TOTAL card	_____	_____	<input type="checkbox"/>
28. Give all information to your United Way volunteer/staff	_____	_____	<input type="checkbox"/>
29. Implement THANK YOU campaign	_____	_____	<input type="checkbox"/>
30. Organize information for next year's campaign	_____	_____	<input type="checkbox"/>