

2018 Campaign Coordinator Training Talking Points Keys to Success



Welcome/Introductions

Thank you for being an ECC!

What is the United Way?

The United Way of Ontario County is run by a partnership of dedicated staff and volunteers who work together to make our community a better place to live.

- **Invest** – You invest in United Way. We invest in solutions to the most challenging issues in our community.
- **Connect** – You connect with United Way through donations, leadership development and networking for good. We connect donors, volunteers, programs and initiatives for a stronger community.
- **Serve** – You serve the community through your donations and volunteer opportunities like the Day of Caring. We serve the community with best practices, key initiatives and helping people in need through our service partners.

Services for the Community

- **Donor Designation** – United Way collects, processes and transfers donations on behalf of hundreds of health and human service agencies in the region.
- **Day of Caring** – Each April, United Way hosts the largest annual community volunteer event, with hundreds of volunteers helping many local non-profits with a variety of service projects.
- **Convener** – The United Way collaborates with Ontario County and Finger Lakes Community College to host an annual Not-for-Profit Summit to discuss challenges facing our service/program providers throughout Ontario County and work together to resolve concerns.

Community Fund

We invest dollars in quality programs that make a measurable difference for people in need in our community. We are committed to providing a safety net of emergency services to help people in times of crisis, along with programs that support kids, families, seniors and people with disabilities.

- Every dollar invested in United Way stays here in Ontario County. We believe in taking care of our own and we want to build a thriving community where we all live, work and raise our families.
- There are so many things in this world that are out of our control, but today in Ontario County there are 45,000 people who are receiving assistance and support through United Way funded programs and services.



- When our community thrives, we all thrive.
 - ✓ One more local kid in after-school means one more high school graduate ready to take on the world.
 - ✓ One more local family with stable housing means one less zombie house causing property values to decline.
 - ✓ One more elder with access to basic needs and services means an active and thriving senior population.

Community Funds Partners

- All programs and initiatives supported by United Way's Community Fund are **monitored, measured** and **evaluated** regularly to confirm they're **achieving positive results** for our community and local people in need.
 - ✓ Community Fund investments focus on three major areas of impact to **address community needs**: Student Readiness and Success, Strengthening People and Families and Supporting People in Crisis
- Donation to the Community Fund are used to support **28 agencies** providing critical services through **38 programs**.
 - **Identify** the greatest needs in the community
 - **Invest** Community Fund dollars in evidence-based and preventative programs
 - **Evaluate** the programs for effectiveness and impact
 - **Adjust** funding if needed to ensure the highest Return on Investment for donor dollars

Giving to the Community Fund vs. Giving Direct

- **ROI** (return on investment) – Your United Way donations are measured and evaluated for the highest return on investment, which means selecting and funding the most effective ways to help as many people as possible.
- **You don't have to choose** – You can help kids AND grandparents. You don't have to choose between giving local kids a great education, meals for a struggling family and helping elders stay safe and independent in their own homes. The Community Fund puts your money where the need is the greatest and supports people across the lifespan.
- **Interconnected network of services and support** – There are many great agencies in Ontario County, but one agency or program can only do so much on its own. United Way connects 38 local programs to share best practices, refer people across services and evaluate results on a community-wide level.

Leadership Giving

United Way has three leadership giving societies and more than 100 donors who give at the leadership level each year. With a \$500+ annual donation, you may enjoy the following benefits:



- Demonstration of significant commitment to our local community
- Networking and connection with other proactive, influential community leaders
- Leadership and career development opportunities
- Service and volunteer opportunities

Leadership donors have the opportunity to interact with those in their own giving society, and are also able to connect with all of United Way leadership donors at multiple events throughout the year.

Tocqueville Society (\$10,000+)

Women's Leadership Council (\$1,000+)

Emerging Leaders Society (\$500+)

What is an Employee Campaign Coordinator?

- What do you think your responsibilities are as an Employee Campaign Coordinator?
- How does United Way see your role as an Employee Campaign Coordinator?
 - ✓ 5 Steps to a Successful Campaign
 - ✓ Best Practices
 - ✓ What are some of the ways you could improve your United Way campaign?

Campaign Materials

- Campaign Poster
- Thermometer
- Brochure
- Employee Pledge Form
- Corporate Pledge Form
- Donor Designation Option Form
- Campaign Video

Thank you!



***Thank You for being an Employee
Campaign Coordinator!***

As an Employee Campaign Coordinator (ECC), your primary role is to plan, coordinate and implement an effective United Way workplace campaign.

We rely on you to impress upon your colleagues the significant challenges many people face every day, and to inspire your coworkers to join the fight to make life better for every person in our community.

Your Responsibilities

- Attending trainings or strategy meetings offered at the beginning of each campaign season.
- Working closely with your United Way Representative to develop an effective campaign plan.
- Recruiting a campaign committee from key areas of the organization.
- Coordinating the distribution of campaign materials and the collection of pledge cards.
- Coordinating kickoff and recognition events.
- Promoting the campaign within your organization.
- Publicizing results throughout the campaign.
- Providing all associates and retirees the opportunity to give.
- Thanking donors and volunteers for their generosity.
- Finalizing the campaign by submitting the 2018 campaign envelope to your United Way Representative.
- Evaluating and making recommendations for next year's workplace campaign.

We're Here to Help!

Thank you for taking on this important role! Your efforts make a huge difference in our community. Should you need any assistance, please contact your United Way Representative:

Kari Buch, Executive Director
(585) 394-6550
kari.buch@uwrochester.org

Dan Spencer, Campaign Associate
(585) 394-6550
dan.spencer@uwrochester.org

Kristen Koczent, Administrative Assistant/Events Coordinator
(585) 394-6550
kristen.koczent@uwrcochester.org



5 Steps to a Successful Campaign

1. Involve your CEO

Securing top-level management support makes your job easier and your campaign more successful. Review your overall campaign plan and ask for his/her support with:

- Allowing you adequate time to plan and execute a successful campaign.
- Providing a campaign budget for food at meetings, incentives, and thank you events.
- Announcing your role as Campaign Coordinator.
- Appointing next year's Campaign Coordinator to work with you - this will ensure smooth transitions each year.
- Sending a letter/email of support.
- Endorsing a plan for leadership solicitation (consider a Leadership Level coordinator.)
- Speaking at employee meetings in support of the campaign and leading by example by sharing that they have already made their pledge.
- Granting permission to take employees on agency tours.
- Attending and participating in campaign events.

2. Recruit a Campaign Team

- Try to include representatives from all departments.
- Talk with your team about strategies and events that have worked/will work in your company.
- Clearly define roles and responsibilities.

3. Set a Goal

A great way to increase your campaign is to focus on increasing the number of people who give or encouraging people to consider giving a little more.

4. Develop a Campaign Plan

Create a Timeline

- Short, quick campaigns work best. Aim for no more than two weeks!

5. Make your Campaign Fun

- Decide on a theme, incentives and thank you events.
- Plan special events or fundraisers. Bake sales, car washes, raffles or rummage sales are a great way to get the whole organization involved and motivated.

***Use Incentives***

Incentives are a great way to increase employee participation! Give everyone who turns in a pledge card fun, inexpensive prizes such as:

- Entry into a drawing for a paid day off.
- Lunch with the boss.
- Special parking space.
- Your company's gear – logoed goodies.

Schedule a Campaign Kickoff

- A kickoff can add a lot of energy to your campaign. It can also help employees understand the importance of participation.

Schedule Agency Tours or an Agency Speaker

- This is one of the most effective best practices you can do to make your campaign a success! Visiting an agency to see the need firsthand or the personal touch of an agency speaker is very powerful!
- Contact your UW Representative to schedule a speaker.



Additional Opportunities for Growth

Winning Back Lapsed Donors

A lapsed donor is someone who given in a previous year, but did not give during the current fundraising campaign. As you collect pledge forms compare who has given to past years. Once you review the list you will be able to quickly identify whether that person has left your company or was absent on the day of your kick-off.

It is important to follow up with those employees to allow them to participate. This can help your company's total campaign dollars go up. If the person is no longer employed at your company please let your United Way contact know to help United Way maintain accurate and updated donor information.

Your UW Representative can assist you with past donor list if needed.

New Hires Program

Through employment changes, job loss and moving, United Way incurs contribution losses. A New Hires Program can help replace those contributions. Please help your community by making sure your company holds a New Hires Campaign through which new employees are asked to support United Way at the time of hire. Materials are available for your orientation packets. Contact Dan Spencer at dan.spencer@uwrochester.org for more information.

Retirees Program - Don't Retire From Giving

United Way relies on the support of retirees as the needs in the community grow. Many retirees have the support of pensions and benefits; there are many more who live around us who don't have that security. Ask your CEO and UW Rep to help you get a Retiree Program started.



50 Ways to Raise Funds — and Fun!

Check out the following ideas for special events, incentives and promotions to promote team building and get more employees involved in the United Way Campaign. Many of these activities will also help to show how donations to United Way's Community Fund can really make a difference for local people in need!

Games & Contests

1. Pie in the face
2. Miniature indoor golf
3. Lunchtime bingo
4. Candy jar raffle
5. Competitions (inter-departmental or inter-company, e.g., golf challenge, lip sync challenge, race)
6. Bowl-a-thon
7. Carnival/Dunking booth
8. E-mail bingo (buy cards and play different variations)
9. Baby photos – match the baby photo with the manager or employee
10. Cutest Pet Contests

Prizes, Drawings & Cash

11. 50/50 drawing
12. Spare change jugs
13. Daily prize drawings or balloon pop for: Restaurant/ Mall gift cards, suite seats at games, tickets for sporting events, concerts, night at hotel
14. Lottery
15. Draw for a day off
16. Collect cans and bottles

Food Fun

17. Breakfast
18. Specialized food sales – candy bars, pies, international food
19. Daily donations for donuts, coffee, snacks, etc.
20. Lunch box/basket auction
21. Tailgate/Cookout
22. Baked goods contest/Sale
23. Ice Cream Social
24. Chili Cook-off
25. Walking Taco Wagon
26. Egg Baby-Care for an egg for a day (\$2 to have another person baby-sit,\$5 hospital charge if egg breaks)

Sales Events

27. Online auction
28. Recipe Book
29. Garage Sale
30. Car wash



31. Book sale
32. Gift basket sale
33. Silent/Live auction

Miscellaneous Incentives

34. Dress Down/Slipper Day
35. Sports Team Day – Wear your favorite team apparel
36. Challenge between departments based on participation, increase in average gift or first department completed
37. Walk/Run fundraisers – Participants get sponsor to pledge total amount or \$ amount per mile

More Fun Ideas

38. Share your campaign updates on social media (e.g., employee testimonials, campaign newsletter)
39. Executives serving breakfast/dinner to employees who won a drawing
40. Executives prepare a feast for employees during a campaign event
41. Ugly Lamp Exchange – Must pay \$5 to have lamp removed from your area
42. Wine raffle
43. Sell/Raffle donated products
44. Palm reading/fortune telling
45. Use of prime parking space for designated time
46. Theatre tickets or tickets to sporting events
47. Dinner for two with the boss
48. Spa/massage day
49. Flower sale
50. Casino night

Incentives & Competitions Sponsor contests that revolve around your campaign effort and offer incentives/prizes to contributors. These are examples of ideas that have been used successfully by other organizations.

During your campaign you can give employees extra incentives based upon their status, for example:

- For a returned pledge form – 1 drawing ticket
- For a new contributor – 1 drawing ticket
- For an increased gift – 1 drawing ticket

Individual incentives – departments, divisions or “teams” of employees compete for top results and a group prize



Other Ideas and Contests

- “The Gift of Time” – ½ day or day off with pay (many variations)
- Raffle off the boss. Employees increasing their pledge or a new pledge receives a chance to win the boss and have him/her perform their job for one hour.
- Senior executive wears the same tie for one week. As company approaches its goal, the tie gets shorter each day to mark campaign progress
- Challenge between departments based on % participation or % increase in giving or average gift
- Gift for department coordinator who delivers best results

FUNdraising Do’s and Don’ts Decide that this is the year to have fun by using special events and other creative activities in your organization’s campaign. Special events are FUN and are an excellent method of raising United Way awareness in your office. Review the guidelines listed below, discuss your plan with your United Way campaign representative and go for it.

DO

- DO talk to contributors.
- DO check out your ideas with your CEO.
- DO something different to bring interest to your campaign.
- DO solicit services and/or items from your co-workers.
- DO use a special event to focus attention on the campaign—not as the total campaign effort.
- DO use special events as frosting on the cake—to help you meet and exceed your “stretch” goal.
- DO tie special events, where appropriate, to completed pledge cards . . . and encourage the use of payroll deduction.

DON’T

- DON’T surprise your boss with a golf tournament on company time!
- DON’T do “the same old thing.”
- DON’T overlook the tried and true elements of a successful campaign—personal contact!
- DON’T forget your well-planned employee solicitation campaign.



NO WAY!

TOP 10 MYTHS ABOUT UNITED WAY

MYTH: My donation doesn't stay here in my community.

FACT: Every dollar invested in United Way stays here in Ontario County. We believe in taking care of our own and we want to build a thriving community where we all live, work and raise our families.

MYTH: I don't have a lot to give so I can't make much impact.

FACT: Your investment in United Way makes a huge difference for our community. There are so many things in this world that are out of our control, but today in Ontario County there are 45,000 people who received support from Community Fund supported programs and services. Right here in Ontario County: 3,300 students fill their out-of-school time with music, science, reading and more; 7,000 seniors and veterans are getting support to be healthy and active; 33,000 people have emergency assistance, counseling support and a helping hand. These are things we can address together, right now, with United Way. From \$1 to \$1 million, investments in United Way's Community Fund fuel the support for thousands of people in need to help change their lives for the better.

MYTH: Most of my donation is going to overhead and operating expenses so I should just give to agencies directly.

FACT: 92 cents of every donated dollar goes back into the community to support critical programs and services. Charity Navigator awards the highest score for fundraising costs if they are 10% or less and the BBB Wise Giving Alliance indicates that a charity should spend no more than 35% of related contributions on fundraising. United Way of Ontario County with the United Way of Greater Rochester is below both of these guidelines. United Way collects, processes and transfers donations on behalf of hundreds of health and human services agencies in the region, and many indicate that participating in the United Way campaign is an effective, efficient way for them to fundraise.

MYTH: United Way programs just provide handouts and are a band-aid solution to our community's problems.

FACT: The only band-aids we hand out are to kids getting in their health and fitness requirements in our after-school and summer learning programs. United Way is dedicated to identifying the greatest needs in the community and investing Community Fund dollars in evidence-based and preventative programs. All United Way partner programs and initiatives are monitored, measured and evaluated regularly to confirm they're achieving positive results for our community and local people in need.

MYTH: United Way only helps people in the city of Rochester.

FACT: We invest in a network of partner programs that help people all across Ontario County. Whether it's a multipurpose aging resource center in Canandaigua or a food pantry in Naples, our programs are connecting resources all across the county to help people in need.



MYTH: I'm never going to need these services so I have no reason to donate.

FACT: When our community thrives, we all thrive.

- One more local kid in after-school means one more high school graduate ready to take on the world.
- One more local family with stable housing means one less zombie house causing property values to decline.
- One more local elder with safe transportation means one less emergency hospital visit driving up healthcare costs.

MYTH: I saw on Facebook that United Way's CEO has a very large salary and that only a small amount of my donation would go to someone in need.

FACT: Don't believe everything Aunt Harriet shares on Facebook. United Way of Ontario County and United Way of Greater Rochester and our operating budget are separate from United Way Worldwide, which is referenced in the image shared on Facebook. Our CEO's salary, operating costs and fundraising costs are kept low so that 92 cents of every donated dollar goes back into the community to support critical programs and services. And we're a four-star charity on Charity Navigator, so we've got that going for us!

MYTH: At XYZ Company we're forced to give to United Way.

FACT: For starters, we're sorry you feel that way. We would never want anyone to feel forced to give to something they don't believe in. United Way does not encourage companies to coerce employees to give. We work with companies to help them offer United Way as a simple, convenient way for their employees to invest in our community.

MYTH: United Way supports Planned Parenthood and I don't agree with that.

FACT: Planned Parenthood receives funding through United Way's Donor Choice program. Individual donors designate to Planned Parenthood; that's the only means by which the organization receives money through United Way.

MYTH: United Way doesn't provide any volunteer opportunities

FACT: While there are no direct volunteer opportunities with United Way at this time, we looking in to ways we support volunteerism and we do plan the biggest volunteer party in Ontario County every year. Every April, we get 400 of our closest friends together to participate in Day of Caring. They help around 90 not-for-profits with everything from painting, planting and mulching to getting camps ready for kids. Visit unitedwayontariocounty.org to learn more. We can also help to connect you with partner programs that have volunteer opportunities.



Campaign Planning Worksheet

Choose Roles for Management and Team Members

Assign detailed roles and responsibilities that match managers' and employees' unique abilities and influence. Assign site coordinators for each department and at each remote location to implement campaign strategy.

PHASE ONE	✓	Notes for follow-up
Attend UWOC Coordinator Training		
Obtain CEO Support and Endorsement		
Recruit Campaign Team		
Train Team/Assign Tasks		
Develop Campaign Plan:		
Goal		
Timetable		
Incentives		
Promotions		
Theme		
PHASE TWO		
Develop a Leadership Giving Campaign		
Plan Campaign Kickoff		
Schedule/Announce Campaign Kickoff		
Arrange for Agency Speaker		
PHASE THREE		
Send Reminder About Campaign Kickoff		
Ensure you have all Campaign Supplies		
KICKOFF		
Hand out Supplies/Pledge Cards		
Establish Deadline for Pledge Cards		
PHASE FOUR		
Report Progress to Employees & UWOC		
Send Reminders to Employees		
PHASE FIVE		
Host a Thank You Event		
Submit Final Results to UWOC		
THROUGHOUT THE YEAR		
Attend Day of Caring		
Attend Other UWOC Events		
Offer New Hires a Chance to Give		