

COMPANY

CAMPAIGN

COORDINATOR

GUIDE

LIVE UNITED™

UNITED WAY OF DANVILLE AREA
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IMPROVING LIVES BY MOBILIZING THE CARING POWER OF OUR COMMUNITY

COMPANY CAMPAIGN COORDINATORS ~

*YOU ARE THE HEART OF THE CAMPAIGN AND THE
KEY TO OUR SUCCESS!*

THANK YOU FOR

LIVING UNITED!

Call United Way of Danville Area – 217-442-3512

For assistance or with any questions

Thank you!

ROLES AND RESPONSIBILITIES OF THE COMPANY CAMPAIGN COORDINATOR

The Company Campaign Coordinator assumes the leadership responsibility for the entire campaign. He or she brings together the necessary resources to carry out a campaign and through skillful management, guides the process to a successful completion.

Many organizations have a Campaign Chairperson and/or Company Campaign Coordinator. In other organizations these responsibilities may be held by one person, under one or the other title. The following responsibilities must be fulfilled whether one person or two or more are in charge.

- * Select Campaign Committee.
- * Encourage appointment of chairperson and/or Company Campaign Coordinator for next year.
- * Organize and manage the campaign.
- * Develop objectives, themes, strategies, etc., in conjunction with the Campaign Committee.
- * Develop partnership with the United Way of Danville Area staff and/or Loaned Executive.
- * Report campaign progress periodically to your top management.
- * Report campaign results to the United Way of Danville Area.

Above all, your job is to be certain the campaign events are executed on time and in a superior manner, to ensure the success of the campaign.

EMPLOYER: TOP MANAGEMENT SUPPORT

To be successful, your campaign will need endorsement from the top. Your Chief Executive Officer should demonstrate his or her support by playing an active, visible role in the campaign. A volunteer from the Campaign Cabinet will be assigned to visit your CEO to encourage his or her support.

KEY RESPONSIBILITIES:

- * Approve employee campaign goals and objectives as determined by the Campaign Committee.
- * Endorse the campaign by writing a letter to all employees asking them to support the United Way of Danville Area and inviting them to group meeting(s). Sample endorsement letters are available at the United Way of Danville Area.
- * Appear at the first Campaign Committee meeting and the employee group meetings to provide personal endorsements.

LAST YEAR'S COORDINATOR

Last year's coordinator may assume any number of responsibilities, depending on the needs of your campaign organization.

KEY RESPONSIBILITIES:

- * Act as an advisor for this year's Campaign Committee.

- * Provide the Campaign Committee with all written documentation from the previous year's campaign.

NEXT YEAR'S COORDINATOR

Next year's coordinator may assume any number of responsibilities, depending on the needs of your campaign organization.

KEY RESPONSIBILITIES:

- * Attend meetings of the Campaign Committee.
- * Accept a key assignment in this year's efforts.
- * Gather information in order to lead the campaign the following year.

LABOR REPRESENTATIVE

Depending on the needs of your organization, the labor representative can serve in a number of roles. In some organizations, this person acts as a support person only; in others, they assume the responsibility for employee solicitation or fill the role of Co-chairperson.

KEY RESPONSIBILITIES:

- * Obtain endorsement of local union.
- * Work in conjunction with the Campaign Committee to formulate strategies.
- * Select solicitors.
- * Contact United Way of Danville Area President to schedule presentations.
- * Speak at all group sessions where union members are present.
- * Monitor and analyze the results of labor participation.

KEY RESPONSIBILITIES:

- * Provide motivation for giving by educating employees and by running a well-planned and executed organization-wide communications program.
- * Develop reporting systems to assist in the financial planning, data collection, progress reporting, and financial assessment aspects of the campaign.
- * Select the solicitors who are best suited for the job according to the structure of the organization. He or she can be responsible for planning and carrying out effective one-to-one and/or group solicitation.

GETTING STARTED

The best time to get started on planning for your campaign is as soon as you are appointed. If your employer hasn't named next year's campaign chairperson, you should encourage him or her to do so. Continuity from campaign to campaign is important and can contribute to an increase in productivity and results.

INSURE THE SELECTION OF THE BEST POSSIBLE CAMPAIGN COMMITTEE:

Your United Way of Danville Area campaign is no different than any other important program; it needs outstanding leadership on the Campaign Committee. Work toward the recruitment of individuals who are recognized leaders, possess the ability to recruit volunteers, and have a capacity to "open any door" within their areas of responsibility.

The United Way of Danville Area campaign offers every individual who works on it an opportunity to become part of something larger than themselves. It stresses their importance both as individuals and as members of a team that cares - collectively and individually - about other people.

CAMPAIGN MATERIALS SHOULD BE AVAILABLE ON THE WEB SITE: www.unitedwayda.com. CALL UNITED WAY - 217-442-3512 - IF YOU HAVE DIFFICULTY ACCESSING THIS.

CONFIRM CHIEF EXECUTIVE OFFICER'S SUPPORT

Meet with employer and gain commitment to:

- * Send letters to managers announcing your role as Campaign Coordinator.
- * Approve campaign objectives/goals (when established).
- * Agree on those serving as committee members and assist in insuring their availability.
- * Establish and recommend Fair Share guidelines.
- * Authorize payroll deduction for pledges if not already an established practice.
- * Visibly endorse the campaign by appearing at the first campaign organization meeting.
- * Approve time for solicitor in-house training and employee in-house kickoff meetings.

At each stage of the campaign, you should communicate with your Chief Executive Officer or his or her top management delegate to keep him or her informed of campaign plans and progress.

OBTAIN SUPPORT OF LABOR

Meet with the head of the union or the head of each union if there is more than one union in your organization and ask for his/her endorsement of the campaign and visible support.

MEET WITH THE UNITED WAY OF DANVILLE AREA STAFF

The United Way of Danville Area staff can help you assess last year's successes, strengths and weaknesses and help you establish realistic goals for this year. Staff can assist you in all phases of your campaign, from the planning stage to conclusion.

Attend Campaign Coordinators pre-campaign meetings.

MEET WITH LAST YEAR'S COORDINATOR AND REVIEW PREVIOUS YEAR'S RESULTS

Last year's coordinator can give you insight into the managing of the campaign. He or she will be able to identify pitfalls to avoid and make recommendations based on experience.

If reports were submitted by individual committee members last year, be sure to review all of them.

DEVELOP A PROPOSED CAMPAIGN SCHEDULE

Keeping the campaign on schedule is one of your most important responsibilities. Key dates you will want to schedule include:

- * Committee meetings.
- * Reporting meetings.

DECIDE ON SOLICITATION PROCESS

Employees can be solicited one at a time, or you can arrange a group solicitation. Each method has its advantages; many organizations use both. Key to all solicitations is your giving first. When you believe enough to give to United Way, it speaks volumes to others.

EXECUTIVE GROUP SOLICITATION

To demonstrate personal endorsement of and involvement in the organization's campaign, the top executives should be solicited. At a meeting held prior to the general employee meeting(s), the Chief Executive Officer should make the presentation to the executive group. Consider also inviting the President of United Way of Danville Area, or the United Way of Danville Area campaign chair to make a presentation to this group as well as all employee groups. Call 217-442-3512 to schedule these.

GROUP SOLICITATION

In group solicitation, executives and employees are notified in advance of a group meeting at which they will be asked for their contributions to the United Way of Danville Area. The United Way of Danville Area strongly encourages that a speaker from United Way address the group. Also, if an employee offers a story about his/her relationship with a funded agency, this has a great impact on co-workers.

AFTER HEARING THE UNITED WAY OF DANVILLE AREA STORY, PREFERABLY FROM A SPEAKER FROM UNITED WAY, AND SEEING THE CAMPAIGN VIDEO, EXECUTIVES AND EMPLOYEES ATTENDING ARE ASKED TO PLEDGE CONTRIBUTIONS, USING THE PERSONALIZED PLEDGE CARDS PROVIDED. SOLICITATION TAKES PLACE BEFORE THE END OF THE MEETING AND PLEDGE CARDS ARE COLLECTED. THIS IS KEY TO THE SUCCESS OF THE CAMPAIGN - IF AT ALL POSSIBLE, UTILITZE THIS PROCEDURE - IT PROVIDES CLOSURE TO THE PROCESS AND ELIMINATES FOLLOW-UP FOR THE CAMPAIGN COORDINATOR. IT USUALLY ENSURES GREATER SUCCESS IN MEETING GOALS AS WELL.

BENEFITS OF GROUP SOLICITATION

- * Presents the United Way of Danville Area story uniformly to the entire work force.
- * Is a flexible method and can accommodate the work schedule of all parts of the organization.

- * Enables employee campaign to be completed in shorter periods of time.
- * Requires training only a small number of solicitors.
- * Removes prospective contributors from the distractions of the work area.
- * Offers opportunity for all employees to contribute.

ONE-TO-ONE SOLICITATION

Before one-to-one solicitation takes place, employees usually attend a campaign kickoff meeting. At this meeting, they hear from top management and union leaders; the campaign coordinator and a United Way of Danville Area representative. They also see the campaign video. One-to-one solicitation begins as soon as possible after the campaign kickoff meeting.

BENEFITS OF ONE-TO-ONE SOLICITATION

- * Allows solicitors to tailor the United Way of Danville Area message to individual employees.
- * Educates contributor about the United Way of Danville Area.
- * Can sometimes help co-worker since the solicitor can refer him or her to a United Way of Danville Area supported agency for help with a problem. If an employee offers to talk about his or her relationship with a funded agency, this has a huge impact with co-workers.
- * Gives solicitor an opportunity to ask for an increased contribution over last year. The United Way of Danville Area can only retain information about each employee's personal giving if it is received from the company. This information should be filed at the company (personnel/human resources department) in order to monitor progress from year to year.
- * Gives solicitor an opportunity to convince a prospective participating employee to contribute this year.

One-to-one solicitation does not have to take a long time. If a solicitor organizes his or her time, the overall task is a part-time effort during one week. One-to-one solicitation works well when the solicitor is on a peer level with the employees.

RUNNING THE CAMPAIGN

The effort that went into planning and scheduling now should be paying dividends. The pace picks up with each meeting you hold with the Campaign Committee. Item-by-item plans are carried out, which in turn allows other elements of the campaign to begin.

Through Campaign Committee meetings, you receive and convey information and maintain a sense of timing and progress. It is during the implementation stage of the campaign that you will draw on most of your skills in leading and managing a successful team. Be sure to use the Campaign Committee meetings as an opportunity to develop teamwork, provide inspiration, and give recognition.

STAY INVOLVED/PARTICIPATE

Throughout the campaign, be visible, stay involved, and participate in campaign activities. Here is a reference list to help you keep in mind the numerous tasks and events that need your attention during the campaign:

- * Attend campaign kickoff meeting.
- * Appear at campaign rallies.
- * Speak at group meetings.
- * Attend special promotion events.
- * Attend some of the solicitors' training sessions.
- * Keep key groups informed.
- * Report campaign progress to Chief Executive.
- * Be very visible to employees.
- * Meet with Campaign Committee.
- * Represent your company at events where other United Way of Danville Area volunteers in the community are recognized.

MONITORING PROGRESS

Once the master schedule is in place, stick to it. Use it to stay on target for the key elements of the campaign.

Hold regular meetings of the Campaign Committee to report on progress. This keeps everyone up to date and provides a forum for contingency planning if any area of the campaign begins to fall behind. By keeping to your master schedule, you can generate and maintain enthusiasm and momentum throughout your campaign. Stress the importance of meeting deadlines.

CHECKING PROGRESS AGAINST OBJECTIVES/GOALS

Use the list of objectives you have set for financial and other parts of your campaign to measure the progress you are making. Monitoring progress against your objectives will help you pinpoint areas where efforts need to be reinforced or redirected.

WRAPPING UP

Analysis and evaluation of all aspects of the campaign will show you where and why you were successful and where and why you were less than successful. Your analysis will provide a knowledge base for next year's Campaign Coordinator. It is an important planning tool and provides continuity for future campaigns.

You and your Campaign Committee also have a basic responsibility to future campaign organizations. From the beginning, you should be developing future leadership so that the campaign can build and grow from experience.

EXPRESS APPRECIATION

Now that campaign activities have wound down, show your appreciation for participants' efforts. Hold an informal lunch or similar get-together as part of your wrap-up activities. Publicly recognize everyone's efforts by publishing pictures of celebration events in your newsletter or posting them on bulletin boards. Send a copy of your company's newsletter to the United Way of Danville Area. Ask each committee member to recognize those individuals who were of assistance to them.

REPORTING RESULTS

In order to carry out recognition events, document all aspects of the campaign and report results as soon as possible after solicitation completion.

COMPARING RESULTS TO OBJECTIVES

Compare campaign objectives to achievements. Analyze strengths and weaknesses of the campaign that were contributing factors either to its success or lack of success.

Conduct a Campaign Critique Session and Review:

- 1) Objectives (were they met?)
- 2) Strengths and weaknesses of the campaign.

Make recommendations for next year's Campaign Coordinator.

PRODUCE A SUMMARY REPORT FOR USE BY NEXT YEAR'S COORDINATOR

This report should present an analysis of your campaign results compared to its objectives, a documentation of the master schedule, descriptions of strategy and themes and why they were used, assessments of whether they contributed to the campaign's success, a description of all aspects of the campaign, and a brief review of how they were carried out.

MAKE IT A YEAR-ROUND EFFORT

Discuss opportunities with your United Way of Danville Area representative. He or she can help your company establish a year-round involvement of employees, helping place them in volunteer programs and making them aware of available services through education programs. As Campaign Coordinator, you can lead the way by encouraging these year-round activities in your organization. Contact United Way of Danville Area to help with this - 217-442-3512 - we would love to do it, e.g., with Day of Caring.

HOW GROUP SOLICITATION WORKS

GETTING READY

The Company Coordinator, with support from top management and organized labor, arranges employee rallies in groups of 20 - 40.

- * The United Way staff or volunteer is notified of the date, time and place of the rally and arranges to provide the video and/or speaker.
- * At the rally, pledge cards (with employees' names already imprinted) are distributed, along with the United Way of Danville Area campaign materials.
- * The Company Coordinator explains details, such as the payroll giving plan.

THE 20-MINUTE PACKAGE

NOTE: Distribute personalized pledge cards as people enter.

APPROX. TIME ACTIVITY

2 minutes-----Opening rally by Company Coordinator with endorsement from management and/or organized labor representative.

5 minutes-----Personal agency tour experience by solicitor or volunteer. (If applicable)

5-10 minutes----Showing of Campaign video.

3 minutes-----Coordinator explains pledge cards and procedures, has employees fill them out, sign them (even if not donating) and turns them in then, requests participation and thanks everyone.

(Pledge cards should be collected at the end of the rally to ensure the most effective results.)

RESOURCES

Speakers are available from the United Way of Danville Area agencies if arranged for in advance. A speaker, like the video, produces tremendous campaign results by educating employees about services available to them. Contact the United Way office to schedule a speaker - 217-442-3512; the office keeps a master schedule of presentations.

The United Way of Danville Area Campaign video delivers a potent message in just a few minutes. People like videos, and the video makes employees aware of the services the United Way of Danville Area agencies offer.

Agency tours are undoubtedly the most powerful way to produce campaign increases. A tour of a United Way of Danville Area agency links employees to the people who are helped by their contributions.

Call...the United Way of Danville Area office - 217-442-3512.

SHARE THE NEWS AND SAY "THANK YOU!"

Giving to the United Way of Danville Area makes people feel good about caring. It also makes them feel good when their generosity is acknowledged.

- * Send a letter from your CEO to all contributors.
- * Feature results of the campaign in company newsletters, posted communications, or at department meetings.
- Give everyone the recognition they deserve!

THANK YOU!

THE 6-STEP CALL

To be an effective solicitor you should first make your own pledge to the United Way of Danville Area. By being a contributor you have the personal experience to ask others to do the same.

Because you have to solicit several people managing your time will be important, that is why we developed a plan to help you do that -- six action steps that will help you organize your calls and help make them effective.

STEP ONE: Make Your introduction and Opening Comments

Within step one you should:

- make a positive, friendly introduction
- develop rapport
- check awareness of services & agencies where they are provided
- explain why you support the United Way of Danville Area

STEP TWO: Explain the Guideline

Explaining the guideline for giving (the Fair Share concept) is an important step. You should explain that your organization's guide to giving was established because people did not know what a reasonable contribution was.

STEP THREE: Ask for the Guideline or an Increase

If you have made a good introduction, you've identified the services the United Way of Danville Area supports and you have explained why the guideline has been set. Now you can go on to step three and ask the person to contribute or make a pledge at the guideline level. If they do not feel they can give at the guideline, ask them to give an increase over last year's pledge. If they have not given before, ask them to consider the cost of a bottle of pop a week (\$1.00-\$1.50).

If the person agrees to complete the pledge card at the guideline, you can go directly to step six, say thanks. However, in most cases the people you call on will not be ready to pledge yet. If they have not done so already, they probably will ask questions now.

STEP FOUR: Answer Questions

Answering questions about the United Way of Danville Area gives you the opportunity to tell your fellow employees more about the United Way of Danville Area.

Knowing the responses to the most frequently-asked questions is an important part of your job as solicitor. A list of questions/responses about the United Way of Danville Area entitled Facts At A Glance is attached to the end of this document.

People will be more generous when the questions they have are answered by you and when they understand the need behind your request for their pledge.

STEP FIVE: Ask for the Pledge

You have answered the person's question, given them an explanation of the guideline, now you are ready to ask for the pledge. Again, you should encourage the person to give at the guideline level.

When the person has completed the pledge card and signed it, you have one more step to go.

STEP SIX: Say Thanks

Nothing is more important than a heartfelt thank you on behalf of the United Way of Danville Area. Since it is not possible for the United Way of Danville Area to personally thank all contributors, please thank the person for his or her time and pledge. Assure them that their contribution will be used to help people in need.

THANK YOU!

COORDINATOR'S CHECKLIST

GETTING STARTED

ACTIVITY	DATE	NOTES
<input type="checkbox"/> Review Past Campaigns with Previous Coordinators		
<input type="checkbox"/> Attend Campaign Coordinator Roundtable hosted by the United Way of Danville Area		
<input type="checkbox"/> Develop Campaign Plan and determine resources		

PLANNING THE CAMPAIGN

ACTIVITY	DATE	NOTES
<input type="checkbox"/> Recruit Committee		
<input type="checkbox"/> Adopt Fair Share and Fair Share Plus Standards		
<input type="checkbox"/> Set Campaign Goal By Potential		
<input type="checkbox"/> Set Timetable		
<input type="checkbox"/> Plan Publicity		
<input type="checkbox"/> Print a United Way of Danville article in your company newsletter		
<input type="checkbox"/> Meet with CEO to discuss Campaign Plan and Secure Personal Endorsement		
<input type="checkbox"/> Meet with Finance Department to organize campaign reporting procedures		
<input type="checkbox"/> Recruit Solicitors		
<input type="checkbox"/> Order Campaign Material from the United Way of Danville Area		
<input type="checkbox"/> Arrange for Agency Speakers and tours through the United Way of Danville Area office		

<input type="checkbox"/> Conduct Solicitor Training Sessions. Contact the United Way office if you would like their assistance with a presentation		
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WRAPPING UP THE CAMPAIGN

ACTIVITY	DATE	NOTES
<input type="checkbox"/> Follow-Up General Solicitation		
<input type="checkbox"/> Send Thank You Letters to All Employees from CEO		
<input type="checkbox"/> Complete Final Report and Submit to the United Way of Danville Area		
<input type="checkbox"/> Announce Results and Recognize Campaign Team		
<input type="checkbox"/> Write Recommendations for Next Year		
<input type="checkbox"/> Select Campaign Coordinator for next year's campaign		