



CAMPAIGN COORDINATOR GUIDE



Great Rivers United Way

WELCOME

WELCOME TO OUR TEAM

Congratulations and thank you for joining us!

Great Rivers United Way's Employee Campaign Coordinators (ECCs) are a group of change-seekers and trailblazers working to create a lasting difference in the Coulee Region. ECCs are frontline volunteers who raise awareness about the vital role that Great Rivers United Way plays in our community. Together, with other passionate volunteers, ECCs lead the charge to improve education, income, and health – the building blocks for a good life – for all.

ECCs are crucial members of the Great Rivers United Way team. Without you, we wouldn't be able to fund programs that provide needed services in our community. When you reach out a hand to one, you influence the condition of all – that's what it means to LIVE UNITED.

Whether this is your first year as an ECC, or you're a seasoned vet, we hope this Campaign Coordinator Guide makes your experience easier and more effective. Please reach out to us for support at any time.

Tim Medinger

Campaign Coordinator
tmedinger@gruw.org
(608) 796-1400, ext. 112

Autumn Grooms

Development Director
agrooms@gruw.org
(608) 796-1400, ext. 104

TABLE OF CONTENTS

Role & Responsibilities	page 3
United Way 101	page 4
Steps for Success	page 5
Best Practices	page 6
*FUN*draising	page 7
Tools & Resources	page 8
Frequently Asked Questions	page 9
Campaign Planning Worksheet	page 10

ROLE & RESPONSIBILITIES

WHAT DOES AN EMPLOYEE CAMPAIGN COORDINATOR DO?

Position Description: Employee Campaign Coordinator (ECC)

Goal: To enable your co-workers to participate in creating a stronger community by planning, organizing, and coordinating a successful Great Rivers United Way campaign within your workplace.

Key Responsibilities:

- Work closely with your CEO, Human Resources Department, and Great Rivers United Way's Campaign Coordinator
- Develop an effective campaign plan including dates, goals, etc.
- Recruit a team of volunteers or committee members to assist you
- Request speakers and materials from Great Rivers United Way
- Coordinate the distribution and collection of campaign materials
- Coordinate your company's kick-off and recognition events
- Promote the campaign throughout your company
- Encourage Circle of Excellence leadership giving (gifts of \$500+)
- Encourage giving of time, talent, and resources among your colleagues
- Educate your colleagues about Great Rivers United Way
- Make your workplace campaign fun
- Thank your company's donors and volunteers
- Evaluate your campaign and make recommendations for next year

In addition, we hope serving in this role is also an opportunity for you to:

- Become more connected to the people in your company
- Strengthen relationships with your co-workers
- Demonstrate leadership skills
- Network with people in similar roles at United Way trainings and events
- Have some fun!

UNITED WAY 101

NEW TO UNITED WAY?

This page is for you! Since 1949, local business leaders have been investing in their communities and achieving their philanthropic goals through United Way workplace campaigns. **Why?**

Because United Way works.

Great Rivers United Way improves the health, education, and financial stability of every person in our seven-county service region. We create lasting change by conducting community research, identifying key issues and areas of focus, and getting the right partners at the table to do the most impactful work.

Because United Way is easy.

A majority of Great Rivers United Way donors take advantage of payroll deduction, pledging to have an amount of money of their choosing taken out of each of their paychecks the following year. Your one donation supports 49 health and human services programs so you don't have to pick and choose which programs to give to, when they're all equally important to the well-being of our community.

Mission *Unite people and resources to improve lives and strengthen our communities.*

Strategic Objectives

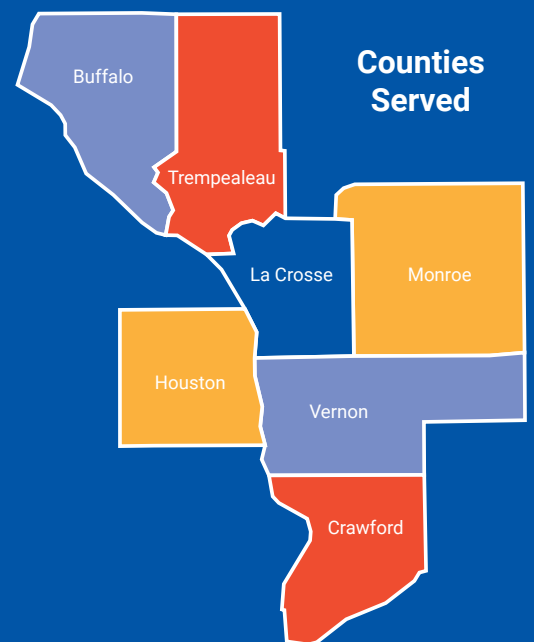
#1
Positively impact our youngest community members

#2
Stabilize household economic situations so people experience thriving lives

#3
Support a healthy and socially-connected community

Impact Last year, 808,800 local people received help from United Way funded programs 67,198 times – that's one person every 39 seconds!

Partners Great Rivers United Way currently funds 49 programs offered by 27 certified partners. See website for a complete list of programs and contact information.



Your United Way “elevator speech”

- Great Rivers United Way works every day to improve the health, education, and financial stability of every person in our community.
- They do that by implementing and supporting programs that help those in need.
- When you give, advocate, and volunteer, you become a partner in the improvement of our community.
- *Add why you give, or your “aha!” moment*

Learn More

Website: www.gruw.org
Facebook: [/greatriversunitedway](https://www.facebook.com/greatriversunitedway)
Instagram: [@greatriversunitedway](https://www.instagram.com/greatriversunitedway)
LinkedIn: [/greatriversunitedway](https://www.linkedin.com/company/greatriversunitedway)
YouTube: [/greatriversunitedway](https://www.youtube.com/greatriversunitedway)

STEPS FOR SUCCESS

PREPARE

- Meet with your CEO to confirm commitment and assemble a campaign team – invite people who can help distribute campaign messaging across all departments.
- Establish a timeline (campaigns average three weeks in length) and set your campaign dates. Be sure to give Great Rivers United Way staff plenty of time to get your online giving forms set up.
- Plan your strategic messaging around campaign milestones – ex: announcement of the campaign, launch day, mid-campaign, final push, and thank you.
- Set campaign goals that your campaign team and employees can rally behind.

EXECUTE

- Celebrate your campaign kick off with an in-person meeting, or record and share a video of your organization's leadership to encourage donating.
- Send your planned messaging company-wide throughout your campaign.
- Host employee meetings – invite GRUW staff and our Campaign (Co-)Chair(s) – and follow up with those who weren't able to attend.
- Run team challenges to encourage participation. Example: The team or business unit with the highest participation wins lunch with the CEO or other company leaders.
- Leverage your campaign team to keep the campaign top of mind. Check in with department heads to discuss strategies and any campaign needs their team may have.
- Keep GRUW staff up-to-date on your campaign's successes (and challenges!), and share progress toward goals company wide.
- Recognize donors: first-time, leadership, and/or loyal contributors who have given for 5, 10, 15+ years.

THE ART OF ASKING

"Not being asked" is one of the top reasons people cite for not giving. Let's remove this barrier!

- Create personal connections. Personal contact and a positive attitude are critical to your campaign team's success.
- Think outside of the box and get creative. Utilize all corporate channels for your asks.
- Share the story of why you, personally, choose to give to GRUW. Make it personal. A personal ask is best, particularly from a friend or colleague. Utilize personal connections and knowledge in your communications.
- Ensure all employees have access to and the ability to invest. Offer incentives for completing pledge forms early/on time.
- Create a ripple effect. Start with people who already give. Their participation will build momentum.

FINALIZE

- Wrap up campaign results with your online giving platform. Submit payroll deduction information to your HR or payroll processing department. If using paper pledge forms, make sure they are collected, copies are made, and either copy is turned into GRUW.
- Submit your campaign report envelope to GRUW.
- Help draft a letter from your CEO thanking employees for their participation.
- Evaluate your campaign's strengths and weaknesses, and record recommendations for GRUW and next year's Employee Campaign Coordinator (especially if it won't be you).
- Thank your campaign team and celebrate your results together.
- Pat yourself on the back for a job well done!

BEST PRACTICES

KICKOFF

- Record a video from a senior executive to be distributed electronically to all employees. Or, start a meeting with a message of support, followed by a presentation – in person is most impactful, but we can also do virtual or recorded.

UTILIZE AVAILABLE RESOURCES

- Visit our online Campaign Center at www.gruw.org/campaign. There you will find sample messaging, videos, a list of our partner programs, impact statements and images, merchandise information, and much, much more!
- GRUW's Campaign Coordinator can guide you through all steps of running your workplace campaign, as well as help you goal set and train your team.
- Need something that is not available on the Campaign Center? Just ask!

COMMUNICATIONS

- Consolidate and coordinate outgoing communications to avoid overwhelming employees.
- Promote a corporate match, corporate gifts, or other incentives to increase employee contributions.
- Have your Campaign Committee make individuals asks of their team. If possible, this is always done best face-to-face. Consider phone calls instead of emails, as well. People give to people.

INCENTIVES

- Popular prizes include a paid day off, premium parking, gift cards, branded merch, unique experiences, lunch with a local celebrity, and approved casual days.
- Consider using completed pledge forms as entrance into the raffle, rather than an additional ticket cost.

EVENTS

- Encourage employees to volunteer on their own, or organize a large-group opportunity for your company. There are hundreds of opportunities on our volunteer website, Ugetconnected (www.uggetconnected.org).
- Popular events include dress down days, potluck lunches, silent auctions, and bake sales. Great Rivers United Way can provide messaging and talking points for these events – just ask!

LEADERSHIP GIVING

- Great Rivers United Way recognizes donors of \$500 or more as members of its Circle of Excellence. Special asks to donors in and approaching these giving levels can be effective in increasing support.

RECOGNITION & THANKS

- Send thank you e-cards from your CEO or Campaign Committee.
- Send personal thank you notes to each of your Campaign Committee members.
- Highlight givers of a certain level on a team call or e-newsletter, or throw them a special thank you event.
- Publicize results and reiterate the impact of gifts via your company newsletter, email, or intranet.

*FUN*DRAISING

PUT THE FUN IN FUNDRAISING WITH THE FOLLOWING IDEAS

Special Events

Special events can add fun and excitement to your workplace campaign. They make a great addition to any campaign-related meeting. To be successful, be sure to time your events so that employees don't think they take the place of pledging.

- Softball tournament
- Golf or putt-putt tournament
- Bake sale
- Yard sale
- Executive dunk tank
- Silent auction
- Lunch & Learn
- Picnic or cook-out
- Ice cream social
- Pancake breakfast
- Carnival
- Office olympics
- Cutest baby picture contest
- Guitar Hero contest
- Costume contest
- Campaign slogan/theme contest
- United Way games (trivia, etc.)
- Pumpkin carving contest
- Office/door decorating contest
- Chili cook-off
- Ugliest tie or earrings contest
- Dress-up (or down!) day
- Employee cookbook
- Creative basket contest & auction
- Recreate a TV game show
- Office treasure hunt
- Car wash
- Plant/flower sale
- Talent show
- Karaoke contest

Incentives

Looking for some free or low-cost incentives to thank donors?

- Lunch with the CEO
- Casual day
- Premium parking for a month/year
- Time off with pay
- Extended lunch break
- Leave early passes
- Sleep late passes
- Sporting/event tickets
- Corporate LIVE UNITED t-shirts
- Gift cards

Themes

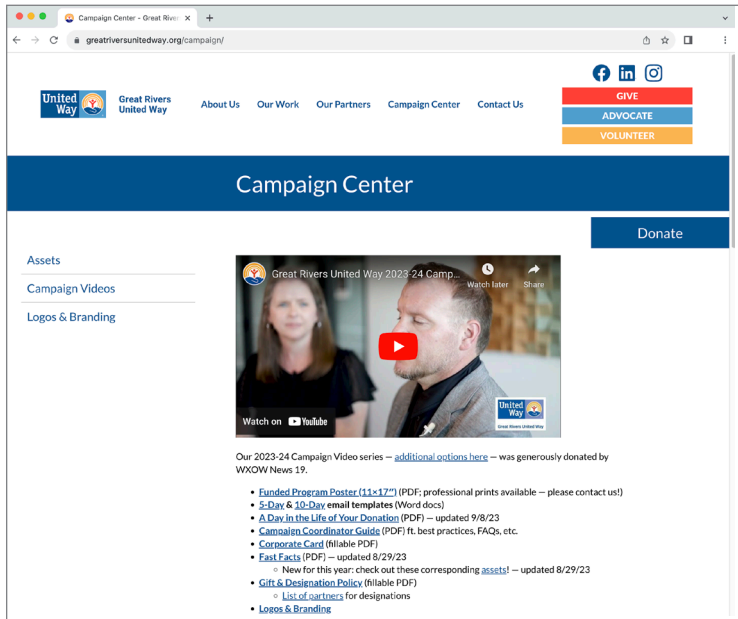
Consider centering your campaign activities around a create theme.

- America's Got Talent
- Top Chef
- Survivor
- A Decade ('80s, '90s, etc.)
- Sports
- Oktoberfest
- Island/Luau

TOOLS & RESOURCES

Great Rivers United Way offers several tools on our website's Campaign Center, pictured below. Many of these materials were created, or improved upon, with ECC feedback. For a complete list of up-to-date files, visit www.gruw.org/campaign.

Need something else? Don't hesitate to ask. If we don't have it yet, we can probably make it!



Display boards

Borrow our large felt display board, which can be customized for your campaign's needs, or one of several portable foam-core displays with general information about GRUW.

Give-aways

GRUW has LIVE UNITED t-shirts and SWAG (Stuff We All Get) that can help support your campaign. This is especially beneficial for public/government organizations that cannot have a budget for incentives. We are also able to hook you up with access to the United Way Store, where you can order (co-)branded merchandise of your choosing at cost to you.

Jeans/Casual Day

An easy fundraiser for any business wishing to support GRUW! We provide the stickers, you set the price (suggested: \$1-3/day), and employees can wear jeans or dress down.

RESOURCES FOR EMPLOYEES

Are you or your colleagues in need help and don't know where to turn? **Connect with Great Rivers 211.** Dial 2-1-1 on a landline or 1 (800) 362-8255 on a cell phone. You can also talk with a specialist 24/7/365 via live chat at www.greatrivers211.org, or text – simply text your zip code to the number 898211.

Great Rivers United Way also offers the following resources in the communities we serve. Please contact us if you are interested in distributing promotional materials for any of these programs at your business.



Bright by Text

Parenting tips by text message, focused on pregnancy through age 8



HealthConnect

A health insurance premium assistance program for those who use the Marketplace



MyFreeTaxes

File your taxes online for free; there's also free tax prep for those who qualify



SingleCare

Prescription discount card that makes it easier to access medication

FREQUENTLY ASKED QUESTIONS

COMMON QUESTIONS ABOUT RUNNING A WORKPLACE CAMPAIGN

Do you or your colleagues have questions about Great Rivers United Way?

We also have an “external” FAQ that answers our donors’ most frequently-asked questions. Feel free to share the link to this page: www.gruw.org/faq. You could also copy and paste one or more of them into your campaign communications. Why not end every email with a Q&A? (Don’t forget an ask, too!)

Q: When should our workplace campaign take place?

A: The timing (and length – more on this below!) of your workplace campaign is up to you. Most take place between July and November, but they can happen at any time throughout the year. We are happy to work on a timeline best-suited for your organization.

Q: How long should our workplace campaign last?

A: The length of your workplace campaign is also up to you, with company size serving as a good starting point: small and mid-size company campaigns typically last 2-3 weeks, and larger or multi-site companies may take 3-4 weeks. These ranges will give you sufficient time to kick off your campaign, get the message out, and make your ask without overburdening staff.

Q: Can we collect pledges online?

A: Yes! Great Rivers United Way has an online giving platform that can collect your employee donations. Online pledge forms can be customized to suit your company’s needs, and can collect payroll deduction, credit card, and billed gifts. We will work with you to decide on the best way and time for sending reports throughout your campaign. For more information, or a demonstration of the site, contact our Campaign Coordinator.

Q: When does payroll deduction start?

A: Payroll deduction usually runs from January 1-December 31; however, this is your company’s decision.

Q: Can employees designate their donation?

A: As a service to donors, we accept designations to: one or more of our three Strategic Objectives; two of our internal programs; or up to five of our certified partners; however, the direct, undesignated, investment of your dollars to Great Rivers United Way’s Community Impact Fund goes further to strengthen education, income, and health – the building blocks of opportunity – in the Coulee Region.

CAMPAIGN PLANNING WORKSHEET

1. ORGANIZE & TRAIN YOUR CAMPAIGN TEAM

List your campaign team. A good ratio is one campaign team member per every 25 employees.

TEAM MEMBER	ROLE

2. GET BUY-IN & SUPPORT FROM THOSE IN CHARGE

List your CEO/top leadership and how they will communicate their support during your workplace campaign.

NAME	MESSAGE & DELIVERY

3. SET CAMPAIGN DATES & GOALS

Start Date _____ End Date _____

CAMPAIGN GOALS		
	PRIOR YEAR RESULTS	CURRENT YEAR GOAL
Employee Participation (%)		
Employee Pledges (\$)		
Corporate Gift (\$)		
Leadership Givers (#)		
Total Dollars Raised (\$)		

Campaign planning meeting dates: _____, _____, _____, _____

4. EDUCATE YOUR COLLEAGUES ABOUT UNITED WAY'S IMPACT

Write down a basic communication plan, including topics, and how and when, you will get the word out.

TOPIC	HOW	WHEN
Ex: XXX	Email	Day 1

CAMPAIGN PLANNING WORKSHEET

5. INVITE EVERYONE TO INVEST

Determine how all employees will be asked (paper pledge form, email with link to online pledge form, etc.).

Paper Pledge Form

- How will they be distributed?
- How will they be collected?
- How are you checking that all donor information has been provided?

Online Pledge Form

- How will the link be distributed?
- How are you ensuring that all donor information United Way needs is captured?

6. THANK YOUR COLLEAGUES FOR THEIR DONATIONS

Think of ways to show appreciation to everyone who invests. Consider providing incentives. Find out if your company has a budget for this.

WAYS OUR COMPANY WILL THANK DONORS
Ex: XXX

7. IMPLEMENT A NEW HIRE / RETIREE PROGRAM

As a way to deal with natural turnover in a company, it is important to include giving to Great Rivers United Way in your new hire and retirement processes.

- Can/how will new hires be introduced to Great Rivers United Way during onboarding?
- Do/could you engage retirees in your workplace giving campaign?
- Are your company's retirees aware that they can continue to give to Great Rivers United Way and that there are payment options just as convenient as pledging?

8. ENGAGE YEAR ROUND

Generate ideas, activities, and events that will help you communicate year-round to your colleagues about Great Rivers United Way.

MONTH	IDEA/ACTIVITY/EVENT

LIVE UNITED

Great Rivers United Way

1855 E. Main St. / Onalaska, WI 54650

p: (608) 796-1400 / f: (608) 796-1410

www.gruw.org



Great Rivers United Way