



Running Your United Way Campaign

a guidebook for successful workplace fundraising

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Welcome!

Thank you for giving your time, energy, and heart to take on the important job of campaign coordinator for your company.

United Way of Anderson County (UWAC) is committed to helping you run a successful campaign. The dollars we raise together will mean more kids have healthy, filling meals and have access to critical afterschool programs. Campaign contributions will help promote financial stability and independence for individuals and families by helping them meet basic needs and offering education and counseling. Gifts through this campaign will support seniors and senior care, ensuring they stay comfortable, safe, and independent as long as possible.

We've put together this guidebook to help you run a successful, rewarding campaign. The resources and tips inside will help you plan, execute, and enjoy the campaign process. We know it can be challenging, so remember that the United Way staff is always available to answer any questions or concerns.

We're excited to partner with you. Thank you for your support as we work together to change lives in Anderson County!



Naomi Asher
Executive Director

Your Role as Campaign Coordinator

As Campaign Coordinator, your active involvement in your organization's campaign is paramount. Campaigns are a great way to show off your enthusiasm and creativity. Running a United Way campaign is a great way to connect with all the members of your company; learn about the critical issues and available services in Anderson County; develop or sharpen your leadership and project management skills; and make a measurable difference in this community through fundraising.

To run a successful campaign, make sure you:

- Schedule an introductory meeting or phone call with a United Way staff person.
- Coordinate the distribution and collection of campaign materials and pledge forms with UWAC and within your organization.
- Collect a pledge form from everyone who donates, even if it is a continuation of last year's payroll deduction or a one-time gift.
- Thank all employees who donate and thank the members of your campaign team.

Whether this is your first campaign or your twentieth, this handbook will help you get the most out of your campaign. Your role as coordinator is crucial to the success of our community. Without you, United Way of Anderson County could not support the programs that provide essential services to thousands of individuals and families.

Nine Easy Steps to Campaign Success

STEP 1: GET STARTED

- Meet or talk with a United Way of Anderson County representative.
- Learn about the value of UWAC and its services by reviewing supplementary campaign materials and our website (uwayac.org).
- Familiarize yourself with United Way campaign support materials. (Let us know if you'd like something specific for your campaign or business!)

STEP 2: ENLIST SOME HELP

Campaigns are always more fun with a good crew!

- Recruit a committee. This could include any past or potential Campaign Coordinators and should represent all the departments in your organization.
- Get your CEO or manager on board. Ask him or her to write a personal letter of support to all employees, or have them speak at a company campaign event.

STEP 3: ANALYZE AND SET A GOAL

Setting a realistic campaign goal can motivate and encourage participation. Talk with past campaign coordinators or a United Way representative to find out what worked or didn't work during previous campaigns.

When looking at past results, pay attention to:

- Total number of contributors
- Total amount raised
- Company participation rate

Based on what you find, consider setting goals for:

- Total dollars to be raised
- Percent of employee participation
- Average gift

STEP 4: CHOOSE A SOLICITATION STYLE

You can introduce the campaign to fellow employees in groups or individually. Both have their benefits, so choose the approach that works best in your organization.

Group Solicitation: Bring employees together to hear about United Way of Anderson County and ask questions about the campaign, then invite them to fill out a pledge form. Group solicitation is more time efficient and helps make sure employees hear a uniform message, so less follow-up may be required.

Individual Solicitation: Meet with employees one-on-one to ask for a contribution. This approach takes more time, but it helps to personalize the campaign and offers a greater opportunity to answer individual questions.

Both: Hold one group meeting or a series of group meetings to introduce employees to the campaign and UWAC, then use one-on-one meetings to follow-up with those who couldn't attend or want more in-depth information.

Emphasize leadership giving (personal gifts of \$1,000 or more) and other giving levels. Hold a separate meeting for all members of management and professional employees before the employee campaign kicks off. This will help set the pace. If this is your first campaign, ask a UWAC staff person for some extra assistance or materials for this meeting.

STEP 5: PROMOTE THE CAMPAIGN

Encourage others to get involved! Reach out to employees by:

- Sending newsletters, emails, and other in-house communication.
- Displaying UWAC posters, brochures, and social media info to build awareness.
- Encouraging friendly competition between departments. Offer prizes and incentives if appropriate.
- Asking management to match contributions or allow cashing out of personal or vacation time as donation dollars.

STEP 6: EDUCATE

It's important that employees know *why* they're giving and how their contribution makes a difference. Share statistics and infographics, invite speakers, or schedule an agency bus tour to show employee donations at work.

STEP 7: RUN YOUR CAMPAIGN

Put all your preparation to work! We've found that short, intense campaigns help keep the momentum and enthusiasm high, but schedule your campaign based on the specific needs of your organization. Remember to:

- Conduct an employee kickoff celebration.
- Use UWAC materials in meetings and presentations.
- Make sure every employee is asked to give. Don't forget employees who work off-site, travel extensively, or are on alternate shifts.
- Make a gift yourself. It is easier to ask others to give when you are also giving.
- Hand deliver pledge forms whenever possible.

- Get help from payroll, data processing, and department heads to make sure everything runs smoothly.

**Employees may wish to designate their United Way contribution to a county other than Anderson; please remind them to mark that on their pledge form.*

If your company uses an internal system or runs through a county other than Anderson, automatic designations may be based on employees zip code. Please ensure that all employees are aware of how this works - check with your payroll department to confirm that money is designated and donated to the correct United Way/organization.

STEP 8: REPORT THE RESULTS

It is extremely important to report the campaign results to UWAC as soon as possible after the campaign wraps up. This allows us to process all contributions and pledges in time for Fund Distribution. Call the UWAC office if you have any questions or concerns. To ensure your campaign is reported and processed correctly:

- Make sure all pledge forms are returned and that everyone who donated also completed a pledge form.
- Make copies of all pledge forms for employees and your company's payroll department.
- Summarize all campaign information on the Report Envelope. Enclose cash, checks, and copies of all pledge forms.
- If your company uses its own pledge forms or e-giving, please provide a summary of the campaign to ensure your company and employees are recognized for your participation.

STEP 9: THANK EVERYONE

Campaigns are a group effort! They are successful because of campaign teams, company leadership, coordinators, and of course, donors. Make sure that everyone feels appreciated for their part in the campaign.

- Send out a thank you newsletter to all departments and donors
- Throw a thank you party for the campaign leadership
- Have departments host a wrap-up/thank you party for every employee who gave

Sample Pledge Form



TELL US WHY YOU GIVE! #GIVINGMATTERSUWAC #commUNITYuwac

CAMPAIGN PLEDGE FORM GIVE. ADVOCATE. VOLUNTEER.

ACCOUNTABILITY
COLLABORATION
IMPACT
SERVICE
TRANSPARENCY



P.O. Box 4158, Oak Ridge, TN 37831 uwayac.org

Questions about this pledge form? Call (865) 483-8431

NAME (Last, First)		COMPANY/LOCATION		
HOME ADDRESS		CITY	STATE	ZIP
PHONE	EMAIL		BIRTHDATE	
Please list me/us in any recognition materials as follows: (ex. John and Jane Smith)				
<input type="text"/>				<input type="radio"/> I wish to keep my gift anonymous

1. COMMUNITY IMPACT

My community matters to me! I give because...

I WOULD LIKE MY DONATION TO BE DESIGNATED TO THE FOLLOWING AREA(S):

- WHERE IT'S NEEDED MOST
- YOUTH DEVELOPMENT
Support the education, safety, and health of children in Anderson County
- SELF-SUFFICIENCY
Help build stable families and foster financial stability
- SENIOR AND HEALTH SERVICES
Keep our community and our seniors healthy
- DESIGNATED TO: _____
\$50.00 minimum contribution

2. LEADERSHIP GIVING

- I want to join/renew membership in United Way's leadership giving (minimum of \$1000).
- Emerging Leaders (\$500 minimum/Under 40)
- Please send me information about planned giving and becoming a Legacy Donor.
- Leading Ladies United (minimum of \$1000)

3. TOTAL GIFT/PAYMENT METHOD

TOTAL GIFT \$	<input type="checkbox"/> EASY PAYROLL DEDUCTION	<input type="checkbox"/> ONE TIME GIFT	<input type="checkbox"/> RECURRING DONATION
	I want to contribute the following amount each pay period: <input type="checkbox"/> \$50 <input type="checkbox"/> \$25 <input type="checkbox"/> \$10 <input type="checkbox"/> \$5 OTHER: _____ # OF PAY PERIODS PER YEAR: _____	Gift to be paid by: <input type="checkbox"/> Cash (enclosed) <input type="checkbox"/> Check (enclosed) <input type="checkbox"/> Credit Card: VISA MC AMEX DISC CC # _____ EXP _____ CVV _____	Please bill me: <input type="checkbox"/> Monthly \$ _____ <input type="checkbox"/> Quarterly \$ _____ <input type="checkbox"/> Annually \$ _____

SIGNATURE **REQUIRED**

Date: _____

