
TOP 10 STEPS TO A SUCCESSFUL CAMPAIGN

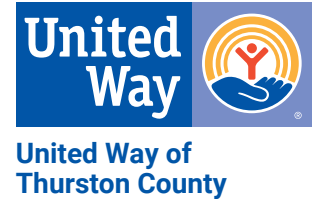


United Way of
Thurston County

United Way of Thurston County fights for the Health, Education and Financial Stability of every person in our community.

TOP 10 STEPS TO A SUCCESSFUL CAMPAIGN

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TOP 10 Steps to a Successful Campaign

1. Recruit a campaign planning committee.
2. Evaluate campaign history and set S.M.A.R.T. goals
3. Gain CEO and leadership support
4. Publicize your campaign
5. Create special events and have fun
6. Conduct an educational campaign
7. Promote leadership giving
8. Ask everyone to give
9. Understand payroll deduction
10. Give thanks and report results

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TOP 10 STEPS TO A SUCCESSFUL CAMPAIGN

STEP 1

Recruit a campaign planning committee

You don't have to do it alone! Engage employees in your workplace to become a part of a planning committee. Everything is more enjoyable when you have the support of others. Include United Way staff!

How to Create a Committee

- Ask your supervisor for committee recommendations – it helps to have all levels and/or departments represented.
- Start with who you know - ask co-workers you are comfortable with if they will join you.
- Create roles/jobs responsibilities (i.e., the fun committee, the food committee, the prize committee, etc.)
- Ask your committee for ideas and suggestions on how to have fun & how to engage their co-workers & departments.
- Ask United Way staff to help you plan.
- Recognize your committee and be sure to thank them!



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STEP 2

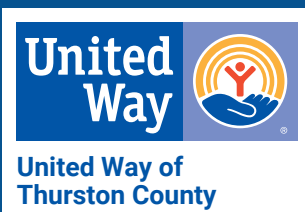
Evaluate Campaign History & Set Goals

*S.M.A.R.T. – Specific, Measurable,
Achievable, Reasonable & Timely!*

How to Evaluate Your Past Results

To know what you want to achieve, you need to know your past campaign results! Campaign goals are an important part of the keys to success! Make sure they're S.M.A.R.T. – Specific, Measurable, Achievable, Reasonable and Timely! An example of a S.M.A.R.T. goal is “to increase leadership dollars by 10 percent by November 1, 2018,” instead of “increase leadership dollars.”

- Set up a meeting with United Way staff to review history.
- Determine what worked and what didn't work in prior years.
- Decide what is most important to your organization (i.e. average gift, employee participation, number of leaders, total dollars raised, etc.)
- **SET GOALS!**



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STEP 2

Evaluate Campaign History & Set Goals

Organization Campaign Plan

Organization _____

Campaign Coordinator(s) _____

UW Staff Support _____

Last Year Results _____

This Year Internal Goal _____

Last Year Participation _____

Last Year Participation % _____

This Year Participation Goal _____

This Year Participation % _____

Last Year Leadership Donors _____

This Year Leadership Donors Goal _____

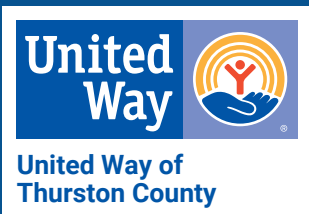
Critical Campaign Elements Plan

Identify your top 3 elements to work on **IMPROVING** this year:

1. _____
2. _____
3. _____

Identify your top 3 elements you wish to **ADD** this year:

1. _____
2. _____
3. _____



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STEP 3

Gain CEO & Leadership Support

The most successful campaigns happen when leadership is involved and present. Meet with your CEO/Leadership & request their support. This is a great time to ask your United Way representative to attend the meeting. United Way is here to support you!

How to Include Leadership and Gain Buy In

Ask your CEO/Leader:

- To meet with you and a United Way representative.
- To speak at a kickoff event.
- To share why they support a United Way campaign.
- To send an email or letter of support.
(United Way can help draft)
- To host a leadership breakfast or luncheon.
- If you have a budget.
- To support you as you review your strategy.
- To participate in a celebration event after the campaign.
- To send thank you letters after the campaign.
(United Way can provide for them to sign)

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STEP 4

Publicize Your Campaign

Employees WANT to know what is going on in the workplace and want to be included. It is important to communicate, communicate!

Share Campaign Information with Your Team

- Communicate via all tools provided by your organization (i.e., email, posters, fliers, interoffice memos, newsletters and announcements).
- Share campaign dates with your co-workers.
- Share goals.
- Share event happenings with the locations, dates and times and invite participation.
- Share and update campaign results regularly.

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STEP 5

Have Fun & Create Special Events

*To have a successful campaign, plan some special events!
Please stress that supporting the event is in addition to
the individual campaign pledge.*

Special Event Ideas

Special events are your opportunity to add a little something extra to the campaign. Not only do they raise extra funding for United Way, but they can be instrumental in team development and great for company spirit. Use this as an opportunity to further educate your employees about United Way and most importantly, have FUN! Remember, not every special event has to be elaborate.

Here are a few ideas to get started:

- Jeans Day During Campaign
- Pumpkin Carving Contest
- 'Thank You!' Breakfast (featuring a Guest Speaker whose life has been impacted by United Way)
- Golf Tournament or Indoor Golf Course
- Live, Silent or Online Auction
- Lunch and a Movie or Themed Lunches
- Root Beer Floats or Ice Cream Socials
- Chili Cook-Off or Iron Chef Competition
- Texas Hold 'Em Tournament
- Executive Car Wash for Employee Groups who raise the most money
- Talent Show
- Sucker for a Buck
- Auction for Reserved Parking Spots or Executive Valet Service
- Garage or Bake Sale
- Sell Cookbooks and/or Calendars
- E-mail Bingo
- Scavenger Hunt
- Cookout or Company Picnic
- Dunk Tank (Take Bids)
- Sidewalk Chalk Artwork Contest
- Popcorn Fridays
- Potluck Luncheons
- Window Dressings to Support the LIVE UNITED message.



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TOP 10 STEPS TO A SUCCESSFUL CAMPAIGN

STEP 6

Conduct an Educational Campaign

People feel better about participating in the campaign, and ultimately giving, when they are informed! Invite us to help you bring in powerful speakers to educate your organization about the company.

Frequently Asked Questions

I'm not sure what United Way does.

United Way of Thurston County (UWTC) is a local health and human services organization. We work to serve those living in Thurston, Mason and Lewis counties. We are a part of a larger worldwide organization known as United Way Worldwide. We are one of 1,400 independent local United Way organizations across the country. We are governed by our own local Board of Directors and led by our local president and CEO. We are not managed, controlled or directed by United Way Worldwide.

Does United Way of Thurston County run their Community Impact Partner agencies?

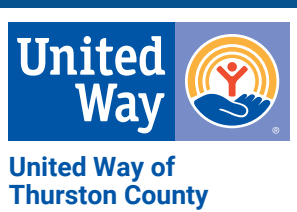
No, every Community Impact Partner agency is a separate nonprofit organization with its own volunteer board of directors and professional staff. UWTC holds Community Impact Partner agencies accountable to achieve the results they commit to when applying and receiving program funding. UWTC vets Impact Partners with respect to best practices in accounting, operations and governance.

I can only afford to give a small amount. Is it worth giving at all?

Yes, every donation makes a difference to someone in need. Giving in proportion to your ability gives a sense of belonging to a larger community. Payroll deduction makes it easy to give a little each pay period resulting in a substantial annual gift.

Why do United Way funded agencies do their own fundraising activities and charge for services?

United Way's fundraising campaign does not cover any agency's entire budget. United Way funds are used for targeted programs. Therefore, agencies have larger budget needs that must be funded by other means, such as government contracts, fees and fundraising activities.



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Frequently Asked Questions (continued)

Does the money stay in our community?

Yes, your donations to the Community Care Fund stay in our service area to address the greatest needs. With everyone giving a little, together we can make a big impact.

Are donations to United Way tax deductible?

Yes, UWTC is a tax-exempt, charitable organization recognized under section 501(c)(3) of the Internal Revenue Code and all donations are deductible.

How do I know my contribution is well spent?

To ensure our donors are comfortable giving, our past audited financials and completed 990s can be found on our website. Audits are performed annually by an independent CPA firm. Audit results and the auditor's report are presented to the volunteer board of directors for review and approval.

I get pressure to contribute. Do you endorse this?

Absolutely not. Giving to UWTC is strictly voluntary. Your gift does make a difference, and we want you to make an informed and willing decision when you give.

Who decides how much money each program receives?

A team of highly trained volunteers – people who live and work in our community – spend thousands of hours researching, visiting and discussing how best to invest your gift to United Way agencies. These volunteers participate in extensive reviews of program plans, budgets & agency financial responses. UWTC funds programs that improve lives in our focus areas of health, education and financial stability.

Where do I get more campaign supplies?

If you need extra campaign supplies, please contact Mike Leonard at mleonard@unitedway-thurston.org or at 360-943-2773 ext. 117.



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Mythbusters

Only a small percentage of my donation actually goes back to the community.

United Way of Thurston County takes pride in the fact that we make the most of every dollar entrusted to us. We currently have achieved the highest possible rating for transparency and accountability from Charity Navigator.

Some United Way agencies charge for their services.

United Way is never the single funding source for any of our community impact partner agencies and many offer services to the community regardless of the individual's ability to pay. Some impact partner agencies offer a sliding scale fee, that allows those who can, to pay a portion of the fee. This allows partner agencies to stretch their United Way dollars to reach those who could not otherwise afford services.

I don't need to give locally, because I already support a number of national charities.

While we all have our favorite charities, United Way of Thurston County is your community solutions provider and is uniquely positioned to both identify current and emerging needs in our area and provide targeted solutions. We support a range of programs and services that help our entire community for the better.

United Way agencies only provide support to the poor.

United Way services are available to EVERYONE in our service area.

My spouse or parents already give, so I don't need to.

United Way depends on the generous support of everyone in the community. Many couples choose to give at both workplaces because they want to participate with their coworkers. It's also a great way to support your company's efforts in building community. By everyone doing their part, we can continue to provide critical services to those in need. Additionally, combined gifts of \$1,000 or more are recognized as Leadership-level gifts.

United Way donations support church-related activities.

United Way funds only health and human service programs, not religious activities. United Way does fund programs provided by agencies that offer a wide range of services including some that are affiliated with local churches. However, these programs are supported because they meet a critical community need and are not religious in nature or approach.



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STEP 7

Promote Leadership Giving

Discuss ways to recognize leadership givers and engage new leaders with your CEO. Leadership donations generally contribute on average 60 percent of all workplace giving. Leadership donors are invited to a special “Night of Thanks” reception hosted only for leadership givers.

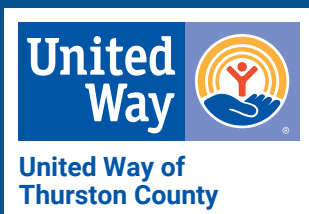
What is Leadership Giving and How Should We Promote It?

- Leadership-level giving is not determined by job title but by the amount pledged.
- A leadership gift for United Way of Thurston County is \$1,000 annually.
- A gift of less than \$20 a week equates to over \$1,000 a year.
- Leadership donors receive additional recognition in UWTC’s annual report.
- Leadership donors are eligible for membership in an affinity group that applies to them – i.e. Women United.
- Join our Step Up to Leadership program for as little as \$500 in your first year!
Progressive Annual Donation Levels – \$500, \$750, \$1000. A \$500 annual donation is just \$42/month or \$21/pay period.

Women United

Women United (WU) celebrates the power of women to bring about positive change in our community through philanthropy and service. Women United joins United Way in fighting for the health, education and financial stability of every member of our community

Contact Randi Nandyal at rnandyal@unitedway-thurston.org for more information.



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STEP 8

Ask Everyone To Give

Asking for support can be difficult, but it is very important. Thank you for lending your voice to remind others that we all play an important role in creating lasting change. If you need suggestions on how to ask for contributions, please contact United Way staff.

Believe it or not – one of the main reasons that people don't give to United Way is that they have never been asked.

Every day people just like you are impacting the lives of those in need. The strength of our community is our people and our willingness to reach out and connect with each other. As an employee campaign coordinator (ECC), you will advocate on behalf of United Way to the community and to your co-workers by asking them to give generously to this year's campaign.

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Understand Payroll Deduction

Now that you have worked so hard on a great campaign, it is time to process the pledges. Your human resources manager or payroll processor is your best friend when it comes to making this happen!

Deduction Period

Fall 2018 campaign deductions usually begin in January 2019 and finish with the last pay period in December 2019, although some companies are on a different cycle.

Documentation

Please include documentation with your pledge forms that details the names of employees and the amount to be deducted/paid. Be sure to include the attached contact and information sheet, and a summary of total pledges inside the campaign envelopes, which will be provided to you.

New Employees

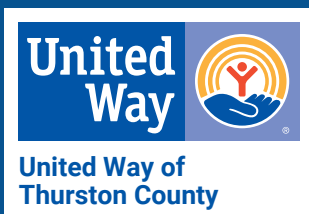
Include a pledge form in your company's new hire packet to give new employees the opportunity to donate to United Way immediately. If you sign up new employees during the year, please include a copy of their pledge form with your next payment.

Departing Employees

Please let us know when you have departing employees and the balance remaining on their pledge. Include this information with your next payment. The remaining balance will be written off as uncollectible.

Remittance of Payroll Deductions

Payroll deductions may be remitted on a pay period or monthly basis to United Way of Thurston County. If you have any further questions, contact Richele Center at rcenter@unitedway-thurston.org. Please make checks payable to United Way of Thurston County.



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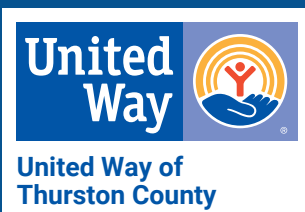
STEP 10

Give Thanks & Report Results

*Everyone wants to be thanked. Be creative and have fun!
Don't forget to include those who helped you on the committee!*

How You Can Say Thank You

- Ask a United Way staff member to help you say thank you!
We can provide you with some thank you tools.
- Ask your CEO or leadership to send out thank you notes or emails.
- Consider having a closing celebration or ceremony.
- Hold a special thank you event for your committee.
- Hold a special thank you event for your leadership donors.



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