

10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN

Step 1: Confirm CEO Support

The success of your campaign depends on the commitment and involvement of your CEO.

Step 2: Review Past Performance and Set Goal

Setting a goal for your company enables you to monitor and report results throughout the campaign.

Step 3: Recruit a Winning Campaign Team

Your Campaign Committee will help you manage your organization's campaign and communicate with employees about United Way.

Step 4: Develop a Plan for Success

A well-planned campaign sets the stage for success. Campaign timelines, scheduled events, and thoughtful incentives help the campaign team and your associates work toward your goal.

Step 5: Promote and Publicize

Information and education are the keys to reaching your campaign goal.

Step 6: Conduct Leadership Giving Campaign

Leadership giving is your company's greatest opportunity for campaign growth.

Step 7: Make the Ask

The number one reason people do not give is because they were not asked. Give everyone the opportunity to make an educated, personal decision about giving to the United Way.

Step 8: Report the Results

Employee follow-up and timely reporting of results is important for your donors and your organization.

Step 9: Say "Thank you"

Wrap up a great campaign by thanking all those who helped you accomplish your goal.

Step 10: Plan for Next Year's Campaign

Getting an early start to next year's campaign allows you the opportunity to execute an even more successful campaign for years to come.



BEST PRACTICES

- Ask your CEO to be a visible part of your organization's campaign by writing letters to your associates and attending campaign events.
- Consider using a targeted percentage increase or a per capita amount when setting your goal.
- Educate your committee about United Way by holding a training session at the facility of a partner agency, allowing them to see first hand how dollars are spent and providing the tools and information needed to answer questions from your associates.
- Educate your associates by inviting them on tours with United Way partners. Ask those associates to report back to the larger group.
- Use incentive and prize dollars wisely to encourage new givers and increases in current pledges with "Step Up" and "First Time Giver" incentive programs.
- Use "Fast Fact" e-mail messages to publicize your campaign and educate your associates about our community's issues and the results of United Way funded programs that are addressing those issues.
- Hold departmental campaign meetings so that everyone may be addressed at once. Distribute pledge cards during the meeting and ask for them to be turned in at the end.
- Update associates frequently about progress toward your campaign goal by using company newsletters, bulletin boards and by posting "thermometers" in common areas.
- Celebrate your success with a fun event such as an ice cream party or catered lunch. Bonus: Ask upper management to do the serving!
- Hold a debriefing meeting with the Campaign Committee, CEO and your United Way representative to talk about opportunities for next year's campaign while they are still fresh on your mind.

FUN CAMPAIGN IDEAS

INCENTIVES

Day off from work	Dinner for Two	Airline Tickets
1/2 day off from work	Hotel Getaways	Trophy for Department
Reserved Parking	Gift Certificates	w/ Highest Participation
Tickets to Games / Movies	Flowers Each Month for Year	Extra 1/2 hour for Lunch for a Week
Grocery Certificates	“Sleep-in” Passes	Time Share* (this could be donated by someone from your company)
Company T-shirts	“Leave Work Early” Passes	

EVENTS

Casual Day	Cubicle/Office Decorating Contest	Pizza Party
Bake Sale	United Way Trivia Contest	Pancake Breakfast
Softball / Volleyball Tournament	Chili Cook-off	Beach Party
Golf Tournament	Ugly Tie / Ugly Earring Contest	Carnival
Executive Dunk Tank	Funniest Home Videos	Office Olympics
Silent Auction	Dress-up Day	Halloween Costume Contest
Management Service Auction	Departmental Penny Wars	Baby Picture Guessing Game
Auction Premier Parking Space	Flamingo Flocking	Children’s Drawing Contests
Sell Popcorn and Drinks	E-mail Bingo	Campaign Slogan /Theme Contest
Luncheon Seminar	Raffles	Voice Mail / E-mail Quiz
Company Picnic/Employee Cookout	Ice Cream Social	

HOW TO CONDUCT AN EFFECTIVE CAMPAIGN MEETING IN UNDER 30 MINUTES

Activity	Responsibility	Time
Welcome employees and give United Way endorsement	CEO	3 min.
Introduce United Way Representative	Campaign Coordinator	2 min.
United Way Representative Presentation	United Way Staff	6 min.
Distribute personalized pledge cards and other information	Campaign Coordinator	5 min.
Questions & Answers	United Way Staff	3 min.
Ask employees to fill out pledge cards and turn them in	Campaign Coordinator	6 min.
	TOTAL:	25 minutes

ONLINE CAMPAIGN RESOURCES

Complete Campaign Coordinator Guide Available at www.uwcb.org/get_involved

- ◆ United Way Logo
- ◆ 2011 United Way Posters
- ◆ 2011 United Way Agency Brochure
- ◆ 2011 United Way Pledge Cards
- ◆ Sample Letter/Email Templates
- ◆ Question & Answer Sheet
- ◆ Fun Campaign Ideas and more!

United Way of the Coastal Bend Staff are always available to assist you in your planning... we’re just a phone call away!
361-882-2529

Check out **WWW.UWCB.ORG** for more Campaign Resources!

Frequently Asked Questions and Answers About United Way of the Coastal Bend

What is United Way? United Way is a locally incorporated, non-profit organization that is the single largest non-governmental funder of health and human services in our community. United Way dollars support more than 40 health and human service programs addressing community problems in the Coastal Bend.

Is United Way a local or national organization?

While we are affiliated with a national service and training organization, United Way of the Coastal Bend is a local, autonomous organization governed by a volunteer Board of Governors. While each United Way must meet basic organizational standards, each is separate and independent from other United Ways in the country.

How does United Way decide who gets my money? How do I know my money is really going to make a difference?

Volunteers decide. Every United Way funded program must meet high standards of quality and efficiency. At the end of each annual campaign volunteers from all walks of life study the needs of the community and determine where your gift, and theirs, can do the most good. They review budgets, conduct on-site visits to the agencies and monitor programs to assure high quality. As donors to United Way of the Coastal Bend themselves, they too want to be convinced that their donation changes lives. You can help. Call (361) 882-2529 or (800) 421-4636 and volunteer to serve on an allocations panel.

What kind of standards are United Way agencies held to?

Each agency funded by United Way of the Coastal Bend must:

- ◆ Be recognized by the IRS as a 510 (c)3 organization
- ◆ Be governed by a volunteer board
- ◆ Provide programs that address an identified need in our community
- ◆ Be audited annually by a CPA firm
- ◆ Annually present their budget, program and projected results to a panel of community volunteers
- ◆ Operate at a reasonable cost

What is the Community Investment Fund? United Way's Community Investment Fund focuses on priority needs in the Coastal Bend. When a donor gives to the Community Investment Fund, trained volunteers invest the gift in a network of community programs and services that work together to provide a continuum of care for those in need. Giving to United Way of the Coastal Bend through the Community Investment Fund is the most efficient, effective way to support a collection of programs that solve local problems and serve human needs.

Can I designate my donation to a specific United Way agency?

Yes. United Way recognizes that some donors would like to direct their gift to a specific agency listed in the United Way brochure. This is provided as a customer service. Funds directed in this manner are sent to each agency separate from their United Way allocation.

I always receive solicitations from other charities and organizations, so why should I give to United Way?

United Way invests your donation in more well-managed programs that change lives and strengthen families than any other organization in the community. Giving to United Way enables you to support a broad range of human service programs with one contribution. If you are giving through work, the convenience of payroll deduction allows you to spread your payments over the course of an entire year.

What is the advantage of a payroll deduction gift versus a one-time contribution?

The payroll deduction benefit that United Way offers allows for convenient giving on an installment basis in any amount. Often larger gifts are possible because giving is incremental rather than all at once. For a nonprofit, payroll deduction provides a steady cash flow, allowing it to plan its service delivery.

I never use United Way services, so why should I give? You never know when you, a member of your family or a neighbor may need a United Way service. Job loss, illness, loss of a loved one, family problems and the problems associated with growing up and growing old know no boundaries. Your gift helps ensure that United Way services are available when they are needed. Anyone who has been involved in Scouting, protected by a lifeguard or experienced a disaster has been served by a United Way program.

How is United Way accountable? Every United Way funded program must meet high standards of quality and efficiency. Experienced community volunteers oversee the dollar allocations to all programs. They review budgets, conduct on-site visits to the agencies and monitor programs to assure high quality. The United Way stewardship process recruits accounting professionals to review each funded agency's audit report and use of funds.

Additionally, United Way's own operating budget and distribution of funds to agencies are audited by an independent accounting firm and are carefully scrutinized by a panel of local community volunteers and United Way's Board of Directors.

Is giving to United Way voluntary? Yes! Giving to United Way is a personal decision and should be strictly voluntary. United Way prefers that donors give from the heart and that coercion is unacceptable when donating. Education about how United Way programs are making a difference in our community is the best way to encourage contributions.

What if my spouse already gives to United Way? Each and every contribution is important and makes a difference. Each person's gift can help United Way meet the community's many needs. We all have a stake in the region's well-being.

Why do agencies still have fund-raisers when they are funded by United Way? United Way of the Coastal Bend funds programs provided by nonprofit health and human service agencies. United Way usually funds a portion necessary for these programs. Agencies must continue to raise funds from various other sources to support their ongoing activities.

Why should I give to United Way if I already give to my church or favorite charitable organization? United Way does not want to take contributions away from other organizations. However, churches and other charities do not meet all of the needs addressed by United Way. Because no organization does more with your contribution, many people choose to include United Way in their overall charitable giving plan.

Isn't United Way just another charity? Most charities have a single cause for which they seek funding. United Way supports a wide variety of causes. We not only help people with the problems you are most concerned about, but also assess community needs and work with businesses and community groups to improve existing services and create new ones.

Have more questions? Please feel free to contact us at 361-882-2529 to discuss any additional questions.

LIVE UNITED.  United Way of the Coastal Bend

711 N. Carancahua St., Ste. 302
Corpus Christi, TX 78401
Ph.: 361-882-2529 Fx:361-888-6882 www.uwcb.org

Contacts at United Way of the Coastal Bend

FULL-TIME STAFF

Amy Towery, CFRE
Resource Development Director
711 N. Carancahua Street, Ste. 302
Corpus Christi, TX 78401
Ph: 361-882-2529 X117
Mobile: 361-249-6468
Fax: 361-888-6882
Email: amy.towery@uwcb.org

Adriana Martinez
Resource Development Coordinator
711 N. Carancahua Street, Ste. 302
Corpus Christi, TX 78401
Ph: 361-882-2529 X116
Mobile: 361-249-6736
Fax: 361-888-6882
Email: adriana.martinez@uwcb.org



United Way of the Coastal Bend

CAMPAIGN ASSOCIATES

Campaign Associates are temporary, part-time employees who assist in our fundraising efforts from mid-July through mid-November. If you need assistance any other times of year, please contact a staff member from the list on the left.

JoNell Huff
Campaign Associate
711 N. Carancahua Street, Ste. 302
Corpus Christi, TX 78401
Ph: 361-882-2529 X136
Fax: 361-888-6882
Email: jonell.huff@uwcb.org

Chris DesRosier
Campaign Associate
Ph: 361-852-9665 x211
Email: desrosier@ccfamilyservices.org

Emma Bauer
Campaign Associate
711 N. Carancahua Street, Ste. 302
Corpus Christi, TX 78401
Ph: 361-882-2529 X137
Fax: 361-888-6882
Email: emma.bauer@uwcb.org

Notes
