

Refine the most important component of every campaign

Tried-and-true campaign meeting pointers.

- 1) **MAKE PEOPLE COMFORTABLE** Pick a meeting place that's comfortable and quiet at a time that's convenient. Hold multiple meetings if your staff is large or works multiple shifts. Offer refreshments if possible.
- 2) **BE FRIENDLY AND CANDID** Welcome people as they enter. Be up-front as you open the meeting: "Yes, we're here to ask you to give. We want you to make an informed choice. Giving is a very personal decision and pledges will be handled confidentially."
- 3) **SHOW THAT THE ORGANIZATION SUPPORTS UNITED WAY** Invite your CEO to speak about why he or she gives, and why the organization runs a United Way campaign for employees.
- 4) **RUN A GREAT MEETING**
 - Have your United Way account manager open and close the presentation.
 - Show your choice of United Way videos.
 - Follow this with a brief talk from an agency speaker.
 - Distribute pledge cards after the speaker presentation so people are informed and engaged before they consider how much to give.
 - You or your account manager should now ask people to give: "All we ask is that you simply give whatever you can afford and make a gift you'll feel good about."
 - Let your account manager take questions and walk people through the pledge form, explaining each section. He or she will also explain the Step Up Challenge.
 - Thank people for coming, for considering giving, and for being generous.
 - Let people know the deadline for returning pledge cards. Some organizations offer incentives for those who turn in their pledge cards at the meeting.

ADDITIONAL RESOURCES

Visit our Campaign Toolbox at www.unitedway-cny.org for any of these helpful tools:

- Speaker request form
- Campaign Videos online
- Common Questions guide
- Spanish Pledge form
- Corporate Pledge form

New for 2009

Loyal Donor Sweepstakes To thank those loyal donors who continue their giving at the same level or greater from last year, we will have a special drawing for 20 \$50 gas cards. Winners will be drawn from all donors who maintain or increase their gifts. PLEASE NOTE: United Way of Central New York must have a record of the donor's 2008 and 2009 gift amounts by December 28, 2009 to be eligible. Prizes were donated by SRC and SRCTec.

United Way Desktop Widget Our newly designed United Way Widget lives on your computer's desktop and gives you all the latest United Way news daily. Visit unitedway-cny.org to download and install the Widget.

United Way Campaign Video This year's United Way campaign video explains what it means to "live united" and shows donors how their dollars are at work in our community even while they are busy doing other things. The video is available on DVD or VHS and can be previewed and downloaded on our website, unitedway-cny.org. Videos about United Way-funded programs and United Way's Allocation Process are also available on the website.

Welcome! And thank you for agreeing to be an Employee Campaign Coordinator (ECC) this year! United Way of Central New York's mission is to "increase our community's capacity to care." We sincerely appreciate your help in bringing the needs of this community to life for your co-workers, offering each of them a personal opportunity to make a difference.

Whether you are new to the role of ECC, or an experienced veteran, we hope that the information we provide in this guide will give you the basic information you need to run a successful campaign. Your account manager is ready to assist you with any aspect of your campaign and you can find more information on our website, www.unitedway-cny.org.

We look forward to working with you this year!

What is United Way?

A quick overview of what United Way is all about

United Way of Central New York was started by local business and civic leaders over 85 years ago as a community-wide effort to raise a collective pool of money to care for those in need. The concept was simple: everyone would do their part, however large or small, and the most important needs of the day would be addressed. Many remarkable community improvements have been made by United Way donors.

From our earliest years, United Way has partnered with businesses to run workplace fundraising campaigns. Today, more than 600 local businesses participate in the annual campaign. As a partner in United Way, your organization is part of a powerful force for good in this community.

When donors make a charitable gift, they deserve to know their contributions will be used well. Donors often wonder: How efficiently does this agency operate? How effective are its services? How important is the need for these services? Is another agency doing the same thing—only better?

United Way "does the homework" most donors don't have time to do. We learn what really needs to be done in this community. We search out the best ways to do it. Then we focus community resources—your gift and the gifts of others—on making an impact where it's most needed, funding the finest programs at well-run agencies, and continually monitoring programs to make sure they stay on track. And unlike non-profits that focus their efforts on one problem or group, United Way works to strengthen the whole community. We help donors have the most impact with one gift, improving the lives of thousands of people each year.

All this research and monitoring takes time and expertise. When donors give to United Way, they get the services of a full-time professional staff plus the skills of hundreds of knowledgeable volunteers—lawyers, accountants, doctors, educators, business leaders and more—who oversee every aspect of United Way, making sure their gifts are invested wisely and used effectively.

When you choose United Way, you know that you have a partner working for you every day, making sure your gift is used well—to change lives, and our community, for the better.

ADDITIONAL RESOURCE: Our Investments in Caring Guide offers complete details of United Way of Central New York's current funding complete with agency / program descriptions and funding amounts. Download a copy from our Campaign Toolbox at www.unitedway-cny.org



Zanette Howe, SUNY Upstate
Zanette and the SUNY Upstate team have created a model campaign with a fun-filled event and a separate, exceptionally successful, Leadership Campaign.

In her first year running the campaign, the 800 donors at SUNY Upstate gave about \$125,000. After 10 years of steadily improving her campaign, the average gift amount has increased, the number of donors participating has more than doubled, and the total amount of giving has quadrupled. In 2006, 1,800 donors in her campaign gave nearly \$500,000.

Her campaign has also won two Governor's Awards for an Outstanding SEFA (State Employees Federated Appeal) Campaign and the United Way Campaign Excellence Award.

Tips for success from an ECC of The Year Award winner

Get to know United Way "In my first year, I attended a United Way training that taught me a lot about United Way and what the organization really does in this community. Having that understanding helped deepen my feeling that I was doing something important and valuable by being the ECC. And it helped me feel more confident that I could answer people's questions.

"I also learned quickly that your United Way account manager can be one of your greatest resources. Sometimes people may hesitate to call their account managers. They may be having trouble or just don't know what to do. But your account manager has seen it all and can offer tips and solutions that have worked well for others in your situation. I've always found them to be helpful and encouraging.

"My last tip would be to have fun yourself, and create fun for others. People respond to people who like what they're doing. And a lively campaign can add fresh energy to the workplace. Build a team to help you run your campaign. Bring in people who you can enjoy working with from across your organization. Set aside some time for creative brainstorming. And keep it manageable. Together with our team, it has taken me many years to improve our campaign to where it is now. Today, people really look forward to it and want to know what the theme will be. But don't overload yourself, especially if it's your first year. Be selective in where you put your energy, set goals, and let it grow each year. And never forget why you're doing this. As ECCs, we are doing something that will change people's lives. That's a nice thing to know at the end of the day."

Campaign basics: The nuts and bolts

Campaigns can be run in as little as a day. An effective campaign is about the quality of the effort, not how long it runs. Effectiveness hinges on treating donors with respect, offering informative, engaging presentations, and making the campaign enjoyable. Set the dates for your kickoff and closing and let people know in advance what you have planned.

Everything you need is at your fingertips. A full suite of promotional and educational materials is available from United Way. We even have a shopping list to make ordering supplies a snap.

The Step Up Challenge makes giving a little more a lot more fun. United Way's Step-Up Challenge is a sweepstakes chock full of donated prizes from companies that are helping the campaign succeed. It's a small incentive for employees to start giving or increase their gifts by \$1 per week. The first drawing September 14, 2009, so start your campaign early and report your pledges every Wednesday so your employees don't miss out on prizes!

Leadership Campaigns can boost your results Running a special Leadership Campaign has been shown to be the most effective way to ask for larger gifts of \$1,000 or more. We offer a detailed guide to help you run a successful Leadership Campaign

Make it Fun! Add special foods, contests, etc. to make the campaign a true workplace event. Here are twenty themes and event ideas that can jump-start your campaign creativity...

Bake Sale	60's, 70's, 80's	Scavenger Hunt/Clue	Contest (any kind!)
Cookoff	Pet show	Murder Mystery	Karaoke
American Idol	Country/Biker/Hippie	Jeopardy	Elvis
Office Olympics	Renaissance Fair	Casino	Auction, Silent or Online
Wine/Beer/Other Tasting	Sports	Mexican, Italian, Irish...	Outlandish Hats/Outfits
Survivor	Monopoly/Scrabble	Golf / Office Putt-putt	50/50 raffle

Okay, you're ready to start! ...now what?

Contact your account manager He or she is ready to help you with everything you need to make your campaign a success. Please don't hesitate to ask for advice, ideas, support, materials—anything you need!

Build support from inside your organization Visible CEO support lets people know the campaign is important to your organization. Having a team makes it easier and more fun for you. Think about including people from different divisions, organized labor, second shifts, remote locations, etc., so all groups have a hand in the success of the campaign.

Make a plan First, what's your goal? To get more people involved? To increase the average gift? Your account manager can help you with techniques that have been successful for others. Once you know your goals, work with your support team to plan your campaign step by step. Remember, it can be simple, but there are a few things you must decide:

- When will you start your campaign? Will you have a kickoff to launch the campaign and get people's attention?
- How long will your campaign run? It can be as short as a day, or run over many weeks if your organization is very large. Just keep the energy level high throughout the campaign and keep communications flowing.
- What will you do to make it interesting and fun? Choose a theme, hold a special event, and don't forget food—it's always welcome!
- What will you do to make it informative and meaningful? Our materials, videos and speakers can bring the importance of giving to life. Chances are, someone at your organization has been helped by a United Way-funded program.
- How will you communicate to employees? Email? Posters? Newsletter? Make a simple communication plan to let people know what to expect and how the campaign is doing.
- What will you do in your campaign meeting(s)? Ideally, you will schedule 15-30 minutes for each meeting and use the time to show a United Way video, hear an agency speaker, and have your account manager explain the details of pledging and answer questions.
- Will you run a special Leadership Campaign? Adding a special focus on donors who will be asked to consider a gift of \$1,000 or more can take just a little extra effort. These donors may ask for more information and will appreciate having the request treated graciously. It is usually most effective to have the gift request made peer-to-peer, from someone who is already a leadership donor.

Report regularly Think about how will you record pledges and coordinate with your payroll department. Make sure to set aside some time for the simple but important task of adding up your pledges and preparing report envelopes. Send in your pledge report by 4:00 each Wednesday to enter your donors in the next week's Step Up Challenge drawings.

Thank donors Thank people in person, with a letter or email. Then thank them again!

Important Events for the 2009-2010 Community Campaign

Kickoff Cookoff This event is held especially for campaign teams to build camaraderie and have fun. So get your team together to cook up some food and fun, or just bring them to the event to enjoy the music (and eat too much for a good cause!) Held at the Regional Market, Park Street Syracuse, Friday, September 11, 2009, noon - 2p.m.

Walk the Talk CEO's from across Onondaga County will "walk their talk" showing their personal commitment to the community. These leaders will bring in the current results from your campaign (or your campaign goal amount) by walking, running, biking, or otherwise traveling in a creative fashion to Unite Way's offices. Bring your team to the staging area to cheer them in! The event will be held on Halloween, so let your imagination fly in planning how your CEO can get here! Held on United Way's offices, 518 James Street, Friday, October 30, 2009, 12:00 - 2:00p.m.

Achievement Celebration

A celebration of giving in all its forms and a tribute to ECCs like you who made the campaign a success. At this event we will bestow our highest honors, the Spirit of Caring Awards and the Campaign Volunteer of the Year Award. This event has been moved from January to April, 2010 to correspond with National Volunteer Week.

ADDITIONAL RESOURCES

Visit our Campaign Toolbox at www.unitedway-cny.org for any of these helpful tools:

- ECC Shopping List
- 2008 Incentives Guide
- Leadership Campaign Guide
- Creative Campaign Ideas