

## **Before the Campaign**

### **Recruit a diverse Campaign Team:**

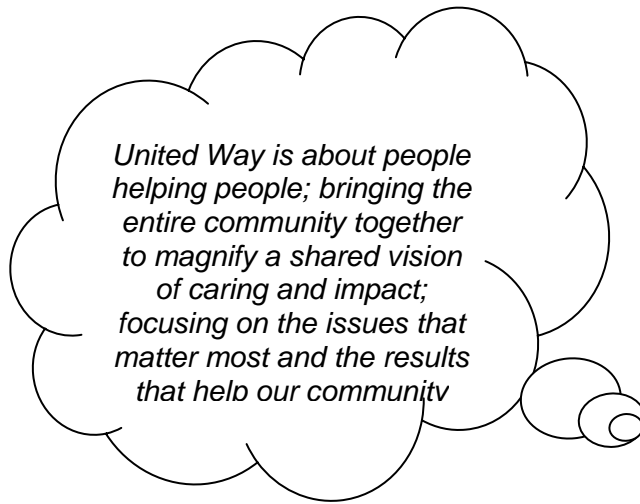
Before you begin recruiting individuals within your company to help you with the campaign, understand the role of the campaign coordinator United Way staff & the United Way Loaned Executive.

The campaign coordinator provides leadership, direction and enthusiasm for your organization's campaign. Here's how:

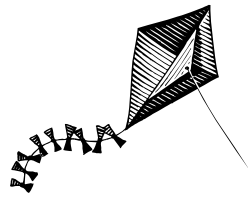
- Become familiar with the United Way's mission, partners, and key messages
- Create a winning team by recruiting others to help make your campaign a success
- Plan, organize, and implement your employee and leadership campaigns
- Work with your CEO and United Way staff and/or volunteer to establish participation and giving goals
- Encourage employees to reach established goals by creating a positive, high-energy atmosphere. Enthusiasm gets results!
- Thoroughly follow-up on all aspects of the campaign so you may report progress of your campaign to your employees and United Way
- Thank and recognize all participants
- Evaluate the campaign, submit final reports to United Way, and make recommendations for United Way

The loaned executive (LE) is an individual who is "loaned" to United Way from their local company. Loaned executives provide organizations with leadership, fundraising, and teamwork skills to plan, implement, and run successful United Way campaigns. The LE is your best campaign resource because they will help you:

- Assist campaign coordinators in organizing and implementing successful employee and leadership campaigns
- Assist with developing campaign goals based on potential
- Generate ideas, provide enthusiasm, and a new perspective for the organizations' campaign team
- Educate and communicate the United Way story in addition to providing answers to frequently asked and/or difficult questions regarding the campaign
- Arrange for requested speakers, tours, and campaign materials
- Communicate campaign progress to United Way
- Assist coordinators with completing campaign on time and reporting results to United Way along with all needed documentation
- Assist with evaluation and recommendations for next year's campaign



As company coordinator, how can you **soar** your organization's campaign to new heights?



**Seek Opportunities that Achieve Results**

- Identify Effective Ways to Communicate the United Way Story
- Review and Analyze Past Campaign Strategies
- Make the Ask
- Handle Objections

A successful United Way Volunteer is always **soaring** ... and always prepared to share the United Way story. They know that United Way of Northeast Georgia serves eight counties.

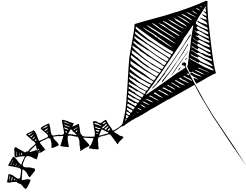
They understand a contribution to United Way is an \_\_\_\_\_ in these communities. We are focused on **results, community, partnerships and change**. We mobilize resources to support over \_\_\_\_\_ health and human service programs, agencies, and initiatives that provide \_\_\_\_\_.

What else do you know about United Way and how would you communicate that to co-workers and peers who don't understand the United Way story?

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United Way touches thousands of people in our community every day. Has a United Way partner or program touched you or someone you know?

\_\_\_\_\_ If so, how were their lives changed because of that service?

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In answering these questions you have begun to form your own personal United Way story to share with others. As you work through this manual and plan your campaign you will need to complete your story. One effective approach is to prepare an **Elevator Speech** – a speech that has many different levels and points (floors) that allows you to summarize what matters depending on the amount of time you have. You can add or eliminate levels (floors) based on your audience and the time you have available. In other words, you should be prepared to tell the United Way story to a peer or co-worker in the time it takes to share an elevator ride.

Here's a **Sample Elevator Speech** that answers the question "Why should I give to United Way?"

United Way understands that you really want to make a difference right here in our nine county area. We want to help you do that.

**(Results Matter.)**

Our 55 years of experience tells us that the best way to help the most people is to focus on the underlying causes of the most serious problems. In our service area, we're focused on critical issues such as early childhood education; uninsured children and transportation and many other issues through over 27 partner agencies.

**(Community Matters.)**

It takes the whole community working together to reach our goals in these areas. So we bring together people from all across the community – people from government, business, faith groups, non-profits and ordinary citizens.

**(Partnership Matters.)**

Your United Way contribution goes to work bringing lasting change, right where you live. .

**(Change Matters.)**



## Learn about United Way of Northeast Georgia & What Matters.

United Way of Northeast Georgia has over 55 years of experience in this community building partnerships to meet community needs. We are focused on bottom line results that change lives and improve the quality of life. An investment in our United Way is an investment in **what matters.**

**What matters** messaging emphasizes United Way is the best way to get involved in my community and make a personal impact. It positions United Way as the leading community organization, focused on **what matters**—lasting change. It energizes and inspires people to make a difference by promoting community involvement.

### **Results Matter.**

- We raise awareness about issues and focus attention and resources on solutions that have measurable impact in **encouraging self-sufficiency, nurturing children & youth, meeting basic needs & emergency response, helping individuals & families be healthy and safe and supporting the elderly**
- We support over 26 health and human service programs, agencies, and initiatives that provide solutions
- Volunteers from across our nine-county area ensure we are good stewards of your investments

### **Community Matters.**

- We improve lives and the quality of life by building and mobilizing resources in Barrow, Clarke, Franklin, Jackson, Madison, Morgan, Oconee, Oglethorpe and Stephens counties.
- We bring together people from all across the community, business, government, nonprofits and private citizens to address the issues that matter most

### **Partnerships Matter.**

- Together, united, we matter more than we know
- Together, we can get results that no one can accomplish alone
- Sometimes we lead, sometimes we support

### **Change Matters.**

- Not just cosmetic quick fixes
- Creating lasting changes in peoples' lives and the community
- Our goal is long lasting change that prevents problems from happening in the first place

**Ideas for Campaign Team based on area of expertise:**

As you build your team, strive to include individuals in your organization who are leaders, respected team players, and dedicated to the success/completion of the job. Keep in mind that a team should include different talents to make the campaign activities exceptional, personalities to connect with a variety of different people, and positions to represent all employees within your organization.

Campaign Co-Chair-someone involved in training & campaign to step up next year & lead the team:

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Accounting/Pledge Records or HR representative: \_\_\_\_\_

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Creative/Fun Event planner: \_\_\_\_\_

Communications/materials: \_\_\_\_\_

Leadership Coordinator: \_\_\_\_\_

One-on-one solicitor: \_\_\_\_\_

Organized person, good at setting up a process: \_\_\_\_\_

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Public speaker: \_\_\_\_\_

Someone to solicit incentives: \_\_\_\_\_

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After you attend training, your top priority is to educate everyone working on the campaign. Work with your United Way staff to develop content and timing for your team training sessions. Your UW staff & loaned executive will provide materials about United Way programs and best practices, give insightful ideas, and answer any questions you may have. Consider holding your training or committee meeting at a United Way agency to reinforce the relevance of your team's efforts and give each team member a story to tell.

**At your first team meeting:**

- Introduce all team members and clarify the role of each team member to the entire group.
- If your team is large, hand out an organization chart as a reminder of roles and responsibilities throughout the campaign.
- Familiarize committee members with United Way – why it is important, how it works, the agencies supported and what they do, and how much it depends on employee campaigns to meet the needs of the community.
- Share key strategies for a successful campaign.
- Appoint members of your team to projects, special (fun) events, leadership giving, pledge form distribution, etc.
- Share the timeline of your campaign
- Review the Pledge Form and the Report Envelope with your team prior to launching the campaign.
- Analyze last year’s campaign or set another meeting where your team has time to brainstorm for campaign potential.