YOUR GUIDE FOR PLANNING A GREAT
UNITED WAY CAMPAIGN
WELCOME!

Thank you for leading the United Way campaign at your organization! As a Campaign Ambassador, you are an invaluable partner with United Way of the Quad Cities. You are critical to engaging your organization in the work of creating the conditions for every Quad Citizen to live their best possible life.

We don’t take for granted the energy, commitment and time it takes to lead your United Way workplace partnership. This handbook is intended to simplify the process and serve as a basic guide for how to PREPARE, PLAN, CONDUCT and CONCLUDE your organization’s campaign. We offer you many ideas, strategies and resources to help make your campaign a success.

We’re grateful to be collaborating with you, your co-workers and organization to make a difference in the lives of Quad Citizens and strengthen our region. Our team is here to support your efforts and provide you the tools and resources needed for an engaging partnership and campaign.

All the best,

Rene Gellerman  
President & CEO  
United Way of the Quad Cities

Mara Downing  
Vice President, Global Brand Management & Corp. Communications  
John Deere  
Campaign Chair

Mike Parejko  
CEO  
Mississippi Valley Regional Blood Center  
Campaign Co-Chair

MISSION

Mobilizing people and resources to improve lives in the Quad Cities.

AMPLIFYING A STRONGER QUAD CITIES

Ready. Set. Go!

Through the power of 14,000 donors, 3,200 volunteers, 350 companies, labor unions, dozens of nonprofit agencies and YOU, the Campaign Ambassador for your organization, we are helping our Quad Cities’ neighbors become healthier, better educated and more financially stable. As a result, the community where we live, work and play becomes stronger.

But there’s more to do.

When you prepare and plan today, you help create the conditions for every Quad Citizen to live their best possible life!

Thank you for leading the charge to change lives!

CONTACT

United Way Representative ____________________________
Phone Number ____________________________
Email Address ____________________________

Return pledge cards to:
United Way Representative ____________________________
Phone Number ____________________________
Email Address ____________________________
2018 Background Information
Total $ raised ________________
# of donors ________________
Participation % rate ________________
Average $ gift ________________
Leadership $ raised ________________
# of Leadership donors ____________

Campaign Details
Company/organization name: __________________________________________________________
Financial goal: ________________
Participation goal: ________________
Campaign will start on: ________________
Campaign should be completed by: ________________
Incentives (i.e., early-bird drawings, 10% increase, first-time donor, etc): ____________________
________________________________________________________________________________
________________________________________________________________________________
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Events Schedule

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<th>EVENT</th>
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<td>Early-Bird Leadership Phase</td>
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<td>Kickoff Event</td>
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<td>Wrap Up</td>
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2019 CAMPAIGN GOAL
$7.5 MILLION

DATES TO REMEMBER

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<th>DATE</th>
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<tr>
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<td>Ambassador Event</td>
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<td>9/5</td>
<td>Community Campaign Kickoff</td>
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<td>9/19</td>
<td>United Way Fall Day of Caring</td>
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*Amplify Quad Cities: The Soundtrack is a special United Way campaign kickoff event of compelling speakers and local songwriters who tell the transformative stories of everyday people whose lives have been impacted because of your ongoing support. Amplify Quad Cities: The Soundtrack will be a celebration of community and an inspiration to help make it a better place for every Quad Citizen.
WHAT WE DO

United Way of the Quad Cities brings together local nonprofits, businesses, labor unions, investors and volunteers to create the conditions for every Quad Citizen to live their best possible life. Our unwavering vision is a community free of poverty where 100% of people have a happy and successful life – living their full potential.

We strategically invest in, collaborate with and mobilize local community nonprofits to solve our region’s most complex issues. Our work and investments stay in the Quad Cities, supporting thousands of people every year.

LET US RECOGNIZE YOU!

The Concert & Community Conversation with Peter Buffett will be United Way’s thank you event, bringing together Quad Citizens who work hard to help us get closer to our community’s BOLD GOALS. During the event, we will celebrate our successes and recognize individuals and organizations who have demonstrated their extraordinary commitment through Advocacy, Volunteerism and Investing, with the Amplify Quad Cities Awards.

Did your organization shine in one or all three of these categories? We want to hear about it. Nomination forms are available shortly after campaign season, but please reach out to your United Way representative and let them know you are interested in submitting a nomination. Do you know a great individual who works hard to serve our community? Nominate them as well.

AMPLIFY QUAD CITIES AWARD CATEGORIES

ORGANIZATIONS

Advocate: Recognizes organizations that speak out on behalf of (or educate others on) issues in one or more of United Way’s focus areas of education, income and health.

Invest: Honors outstanding United Way workplace campaigns and their commitment to creating opportunities for Quad Citizens.

Volunteer: Recognizes an organization whose volunteer program and volunteer efforts have made a significant impact in our community.

Spirit of Quad Cities: This award goes to one company who exemplifies all three components — advocate, volunteer and invest — during their year-round commitment to United Way of the Quad Cities.

INDIVIDUAL

Individual Advocate: Awarded to one individual who has made significant contributions toward United Way’s mission through advocacy efforts using a variety of approaches.

Individual Volunteer: Recognizes one outstanding community volunteer whose unselfish and dedicated service made a significant impact in the community.
RESOURCES AND MATERIALS

Running a United Way campaign in your workplace can be challenging, rewarding and a great way to bond as a team... while helping to create the conditions for all Quad Citizens to live their best possible life. Here is a summary of the resources available to you. Visit unitedwayqc.org/campaigntoolkit to download the files.

This BEST PRACTICES GUIDE is a brief, high-level list of tips and tricks to get you started.

BROCHURES that detail the campaign, our work and ways to get involved can be requested from your United Way representative. The primary campaign brochure is a "must read" for everyone in your organization.

CAMPAIGN VIDEOS can make a meaningful impression as they vividly highlight local success stories. Choose videos that:
- Give an introduction to United Way and why your investment matters.
- Provide personal testimonies from clients that have overcome challenges with the help of United Way.
- Explain United Way's work.

POSTERS can be downloaded or are available from your United Way representative.

SAMPLE COMMUNICATIONS are pre-written templates to help you craft emails, letters, presentations, etc., for your workplace campaign. Don't miss a review of these materials to help jumpstart your campaign.

OTHER RESOURCES include:
- Community data
- Every dollar mattershandout
- BOLD GOALS 2030
- Donor Network inserts
- Frequently asked questions

PLEDGING MATERIALS and instructions for how to fill them out (including Spanish pledge forms)

DIGITAL RESOURCES consist of facts and slides for social media, daily emails or television displays.
- Intranet content
- Presentation slides
- Stories
- Emails - kickoff, thank you and updates
- Photos
- Infographics

ONLY HAVE 60 SECONDS?

Be an advocate:
- United Way mobilizes people and resources to improve lives in the Quad Cities.
- We raise funds in order to provide strategic grants to high quality local programs, but we are more than just fundraisers.
- We’re finding new solutions to old problems. We work together to solve complex issues, improve lives, leverage local expertise, generate a high return on community investments, measure its impact and offer excellence in communication about our work to all stakeholders.
- Volunteers play a key role in United Way’s community mobilization efforts. More than 3,200 volunteers donated nearly 14,000 hours to help people in 2018.
- United Way believes in accountability and transparency, so we report back to the community on the progress that’s being made.
- United Way works proactively to improve the lives of Quad Citizens rather than reacting to problems after they happen.
- When you make an investment with United Way, you aren’t supporting one cause or one agency. You’re supporting a wide range of services that help people with a wide range of needs.
- United Way is the place where investors, organizations, labor, faith groups, nonprofits and clients come together to create the conditions to help Quad Citizens live their best possible life. We want you to join us!
HOW UNITED WAY INVESTS

The funds raised by United Way of the Quad Cities – more than $6.9 million in 2018 – are invested in local programs and initiatives addressing the most pressing challenges individuals in our community face, which is why people like you help determine how those dollars are invested.

Quad Cities’ experts in the areas of education, income, and health provide advice and direction on investment decisions. Corporate investors, community leaders, labor unions, individuals from philanthropic and community organizations, and others carefully study each request for support. They select the local programs that best align with our strategies and have the highest performance outcomes to propel us to our BOLD GOALS for 2030.

With hundreds of nonprofits in Scott and Rock Island Counties, our Community Impact team and over 100 volunteers it’s no small task identifying which programs align with our goals and strategies to create the most lasting impact in our community. We currently fund 36 impact partners.

SIGNATURE PROGRAMMING

United Way of the Quad Cities proudly manages these five centerpiece programs:

- **WELL SUITED**
  African American Leadership Society (AALS) proudly funds Well Suited, a mentoring program that pairs male African American professionals with African American boys in grades 1 – 9, in an effort to build relationships, promote confidence and inspire pride. Mentors serve as role models and life instructors to provide educational and emotional support to their mentees.

- **CHALLENGE FIVE**
  “Strive for Five” is a message of United Way, Arconic and local school districts encouraging parents and students to improve school attendance. Missing just two days a month can impact behavior and grades. Challenge Five is working to keep kids on track and at school so they can be successful in life.

- **BORN LEARNING**
  An initiative of Women United, Born Learning is empowering Quad Cities’ parents and caretakers to be their child’s best first teacher. United Way of the Quad Cities knows what happens in a child’s early years matters for school readiness and success in life. That’s why we invest in Born Learning Academies and Trail programs for parents. Both provide practical tips and tools to help parents and caretakers provide quality early learning opportunities for young children.

- **READYROSIE**
  An initiative of Women United, ReadyRosie brings together preschool educators and families outside the classroom walls with a goal of closing the opportunity gap for all children. ReadyRosie is an app that shares powerful activities and expert videos that support parents, caregivers and children with their learning so they are ready to enter kindergarten.

- **VITA**
  As a free tax preparation program, VITA engages IRS-certified volunteers in tax preparation efforts for the community at no cost. The project helps to ensure Quad Citizens receive all the tax credits they are eligible for while offering the opportunity to open a savings account. The average return is $1,500 per family. A total of $5.2 million was returned to Quad Citizens last year alone helping families meet their basic needs and build financial stability.

SPECIAL EVENTS

Special events should enhance your workplace campaign, not replace it. Not all special events need to be fundraisers; it is equally important to educate and take time to thank everyone. Special events can be used to raise awareness of the campaign and team-building opportunities, and are held as kickoff or wrap-up events. Since these funds come to United Way of the Quad Cities anonymously, we cannot recognize individuals or provide tax receipts for money given through special events. Consider holding one or more of the following:

- Baby picture contest
- Bake sales/basket sales/craft sales
- Vacation day – employees “buy” a vacation day
- Casual day – sell casual for a cause stickers
- Penny wars – obtain large, water-cooler-sized jars, divide into teams, and invite them to decorate the jars. Put pennies in your jar to increase the score and sabotage others by adding silver coins and dollar bills, which decrease the opponents score. Total each jar, determine the winner and donate the money to United Way
- Tailgate party
- Chili cookoff – each person buys a ticket allowing them one vote
- Basket auction – teams create themed baskets that are then auctioned
- Balloon grams – for $1, send a thank you/best wishes balloon to fellow employees
- Ice cream social
- Cake walk
- Team/team department challenges
- Managers serve breakfast or lunch
- Car wash – senior management washes cars
- Dunk the CEO or senior leadership
- Golf tournaments
- Raffles for donated items
- Silent auction – use email to auction donated items
- Cake or cookie decorating contests

INCENTIVE & PRIZE IDEAS

Many organizations provide incentives tied to their campaign goals. A large budget is not necessary for incentives. There are many free incentives you can offer to employees for participating in the campaign. These items can also be donated and used in silent auctions or raffles.

- Bonus vacation days
- Jeans days
- Executive parking
- Gift certificates donated by local businesses
- Longer lunch breaks
- Day off to volunteer
- Flowers
- Cafeteria coupons
- Lunch/dinner with CEO or senior management
- Gift bags/goodies
- One share of company stock
- Use of organization’s car, condo, etc.
- Sleep in, late or leave work early coupons
- Family photo
- Organization gear and logo items
- Challenges among departments
- Honor wall
- Tickets to local sporting, arts or music events
- Gift cards — retail, gas, oil change, etc.
CAMPAIGN IDEAS

Make it fun. A campaign that is fresh and fun makes your job more enjoyable and creates more awareness among your co-workers. Here are some theme ideas and events to help you make your employee campaign more exciting and effective.

THEMES

• Amplify Quad Cities: The Soundtrack
• Company milestone or anniversary
• Music
• Superheroes
• Reality TV — Amazing Race, The Voice
• Carnival theme with dunk tanks, etc.
• Driving results – car/race theme
• Beach
• Game show
• Hawaiian – luau
• Hollywood – movies, Oscars, walk of fame
• Power of Giving/Power of One
• Sports/Olympics
• Travel around the world
• Wild, wild west
• Decades - 60’s, 70’s, 80’s
• Halloween, Thanksgiving or any holiday
• Mexican fiesta
• Old Hollywood
• Game night
• Masquerade ball
• Tailgating
• Trivia night
• Denim and diamonds
• All one color (all red)
• In the barnyard
• Game on!
• Back to School

CAMPAIGN AMBASSADOR

The Campaign Ambassador is the centerpiece of the workplace campaign. Supported by United Way staff and representatives, and with the help of employees on a campaign team, the Ambassador leads efforts for investing, advocacy and volunteerism within the campaign.

CAMPAIGN TEAMS

Led by the Campaign Ambassador, campaign teams coordinate the organization’s campaign.

EMPLOYEES

Inspired by the Campaign Ambassador and campaign teams, employees become investors, advocates and volunteers for United Way of the Quad Cities.

UNITED WAY STAFF

United Way staff and representatives provide direct support for Campaign Ambassadors.

CAMPAIGN CABINET

Dozens of community, labor and business leaders serve on United Way’s Campaign Cabinet to recruit new organizations and investors to partner with United Way and raise money to create the conditions for every Quad Citizen to live their best possible life.

VOLUNTEER-LED COMMUNITY IMPACT CABINETS

Teams of volunteer community leaders help United Way of the Quad Cities chart the course for achieving its goals in its focus areas of Education, Income and Health.
As the Campaign Ambassador for your organization, you and your team of colleagues assisting are the centerpiece of your United Way campaign. You will make a difference in the Quad Cities when you put together an engaging, meaningful, and FUN workplace-centered campaign. Here’s how you can do it:

1. PREPARE

- Learn about United Way of the Quad Cities and the community’s BOLD GOALS for 2030 in Education, Income, and Health.
- Participate in United Way’s visit with your CEO so you are connected to the goals set for your workplace campaign.
- Meet with your CEO to discuss campaign goals, secure his/her endorsement, request permission to make presentations, offer incentives to donors and confirm a corporate match or gift.
- Meet with your United Way representative to discuss how they can help support you and your organization’s campaign.
- Recruit your campaign committee, reach out to diverse departments.
- Assign specific tasks to your team and schedule periodic planning and progress meetings.
- Attend the Let’s Band Together: networking and know-how event on August 27 to learn how to run a great campaign (see page 3).
- Visit UnitedWayQC.org and the Campaign Toolkit page for ideas and best practices.
- Analyze the previous year’s campaign results with your United Way representative.
- Set new goals, timelines, and strategies, including goals for total donations, participation levels, special event dollars raised, and other measures of success.

2. PLAN

- Determine a fun campaign theme tied to United Way’s mission and length of time that works best for your organization. The most effective campaigns run 2 to 4 weeks.
- Develop leadership giving strategies to engage donors in Leadership Circles and our Donor Networks: African American Leadership Society (AALS), Women United, JoCo United, and Young Leaders United.
- Review campaign print materials and other resources available on United Way’s Campaign Toolkit at unitedwayqc.org/campaigntoolkit
- Set a rally schedule and invite your United Way representative to speak.
- Plan and schedule special events like raffles and fundraisers. (See a list of great ideas on page 15.)
- Request flyers, table tents, posters and more from your United Way representative to decorate raffles and informational displays.
- Meet periodically with your United Way representative to review planning decisions and secure their commitment to attend your campaign activities.

CAMPAIGN TIPS

- Time it right. Choose a campaign timeline that best fits your organization’s activity level and allows your fellow employees and leadership to be most engaged. The length of the campaign is also a key consideration.
- Get high-level buy in. Leadership donors can drive a campaign’s success by creating momentum. When the CEO and senior management are the first to invest, others will follow their example. Suggest that a special leadership-giving chairperson be assigned to target those able to invest at a higher level.
- Advocate for organization match. Connect organization investing to employee investing by creating an organization challenge match for employee donations.
- Be visible. Get on the agenda for scheduled organization-wide events, department meetings, or other employee gatherings. Plan these presentations in advance of the full campaign. Be prepared.
- Participate in Day of Caring. Scheduled for September 19, this event is a great opportunity to see United Way’s work in action. People in our community need your help. This is how you show your employees the impact they can have.
- Kick off strong and create incentives. A launch event sets the tone for the campaign. This is a great time to announce incentives, contests and drawings.
- Make it personal. A personalized ask is best, particularly from a friend or colleague. Use personal connections and knowledge in emails and all campaign communications.
- Promote. Publicize. Plan. Raise awareness of United Way’s work. Send email updates. Have a presence on your organization’s intranet. Form a committee. You can count on United Way for support and advice on your publicity and marketing efforts.
- Thank and celebrate. Acknowledge those who help. Involve and recruit others who share your commitment. Thank them again and again. These actions are a big part of making your current campaign a success and setting the stage for next year’s campaign.
- Amplify a stronger Quad Cities! Opportunities to amplify a stronger Quad Cities don’t stop at the end of your campaign. Let your colleagues know about ongoing, year-round opportunities to volunteer in the community and advocate for issues through United Way.
“HOW MUCH SHOULD I INVEST?”

At United Way of the Quad Cities, we believe charitable giving is a personal decision. During the course of the campaign, you will likely be asked “How much should I invest?”

Here are a few options you may want to consider when answering this question:

- Averages can be used to help people decide how much to give. The average annual donation to United Way in 2018 was $717 or about $14 a week. Ask your United Way representative about the average gift amount for your organization.
- Some organizations build suggested investment amounts into the campaign theme and compare donations per pay period to everyday purchases.
- Tell people about the impact their gift can make.

**EVERY DOLLAR COUNTS**
- Just like every Quad Citizen.

Here’s how weekly contributions can make a real impact:

- **$1 per week** ($52 gift)
  - Provides three days of meals service for a family caring for a special needs child.

- **$3.50 per week** ($182 gift)
  - Provides one month of after school programming for one student.

- **$5 per week** ($260 gift)
  - Provides meal service for a low-income person for four months.

- **$10 per week** ($520 gift)
  - Provides transportation to a class or job resulting in the financial stability of four people.

- **$19.50 per week** ($1,000 gift*)
  - Provides summer student support to improve reading and math skills for 30 students.

- **$48.50 per week** ($2,500 gift*)
  - Provides quality early learning programs to prepare one low-income child for kindergarten.

- **$97 per week** ($5,000 gift*)
  - Provides post-secondary education and training for industry-recognized certification and placement.

*Gift amount is rounded. These amounts represent average costs of some services that can help a family overcome poverty. United Way of the Quad Cities invests in these and other strategies and services to help create the conditions for every Quad Citizen to live their best possible life.

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**3. FACILITATE**

- Keep your United Way representative involved and informed. They will be there every step of the way to assist!
- Highlight an organizational spokesperson (CEO, other senior leadership, or campaign team member) who can provide a personal testimony as to why the United Way campaign is important to them.
- Educate employees by promoting your campaign through a kickoff event, presentation rallies and other scheduled special events. Be sure to include your United Way representative.
- Have your CEO encourage leadership giving and promote donor networking including JoCo, Extension, Women United, African American Leadership Society or Young Leaders United.
- Send a customized kickoff email to employees based on the United Way template found in the Campaign Toolkit.
- Include incentives for attendance, participation, investments and reaching departmental or organizational goals.
- Bring employees together for a themed meal or in smaller groups, such as by department.
- Provide campaign materials for every rally attendee, with other pertinent handouts.
- Provide details on how the pledge process works at your organization.
- Utilize United Way-produced videos, emails and stories through periodic emails, intrainet content, social media, voice mails, paystub inserts, posters and displays. Find them at: unitedwayqc.org/campaigntoolkit
- Specifically ask co-workers to participate by investing, volunteering or advocating.
- Volunteer during Day of Caring or any United Way or workplace-sponsored community action activities. Examples: assembling Literacy Kits, reading to kids, preparing and serving a meal at a shelter. Learn more about how you can get involved at: unitedwayqc.org/volunteer-opportunities
- Follow up with employees and past investors; reminders are often appreciated.
- Account for all off-site employees, new hires, and retirees; follow up with employees returning from maternity leave, vacation, disability and travel.
- Routinely update your co-workers and CEO on your progress toward established goals.

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**4. CONCLUDE**

- Consider final push and close-out strategies to encourage last-minute commitments.
- Always recognize investors. Show them the impact of their contribution in the community, and encourage them to stay engaged with United Way’s efforts.
- Write a thank you message in your organization’s newsletter.
- Plan a thank you event and invite everyone who participated to attend.
- Send a letter or email from you and your CEO or senior leadership thanking every employee for their contribution. Use the customizable template located in the online Campaign Toolkit at unitedwayqc.org/campaigntoolkit
- Thank your campaign team.
- Critique and document the campaign to ensure that next year’s campaign goes smoothly with your internal committee and United Way representative.
- Fill out the pledge envelope and arrange for your United Way representative to pick it up, along with any surplus campaign materials.
- Turn in envelopes regularly as pledges come in to ensure rapid processing of your co-worker’s pledge and the organization’s results.
- Develop a year-round United Way program with newsletter articles chronicling community impact, volunteer opportunities and agency tours, orientation sessions for new employees and more. Be creative while working within your organizational culture.
- Invite your United Way representative to speak to employees at any time during the year to share success stories and say thank you.

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Find all of the materials, messages and resources you need to support your campaign in the Campaign Toolkit at unitedwayqc.org/campaigntoolkit
LEADERSHIP CIRCLE

United Way of the Quad Cities Leadership Circle recognizes our community’s most committed individuals and families, the leaders who annually contribute $1,000 or more to United Way.

Leadership Circle contributions advance the common good in our region and improve lives by focusing on education, income and health. These are the building blocks for a good life: a quality education that leads to a stable job, enough income to support a family through retirement and good health.

Donors can invest to United Way of the Quad Cities at a leadership level to join, or invest to one of our Donor Networks:

**WOMEN UNITED**
$1,000+ INVESTMENT
Women United invests in quality early care and learning so every child in the Quad Cities is prepared for school. Investments focus on research-based strategies and programs. Members are also active in advocating and volunteering.

Learn more: unitedwayqc.org/womenunited

**AFRICAN AMERICAN LEADERSHIP SOCIETY**
$1,000+ INVESTMENT
African American Leadership Society (AALS) embodies a culture of caring, community and investing. Members foster the next generation of African American leaders and create the conditions to live their best possible life.

Learn more: unitedwayqc.org/aals

**TOCQUEVILLE SOCIETY**
$10,000+ INVESTMENT
Tocqueville Society represents the highest level of philanthropic giving from individuals and families. These caring philanthropists make an outstanding commitment to transforming our region.

Learn more: unitedwayqc.org/tocqueville

**YOUNG LEADERS UNITED**
$250+ INVESTMENT
Young Leaders United is a dynamic group of passionate, young Quad Citizens all about making connections — with a purpose. With Young Leaders United, you’ll have opportunities to give back to the Quad Cities at events while meeting other ambitious and passionate young adults.

Learn more: unitedwayqc.org/youn(leadersunited

SAMPLE CAMPAIGN TIMELINE

Organizations have different cultures, numbers of employees, locations, and other details that affect the length and focus of their United Way campaign. Assess what will work best for your workplace and begin planning based on those parameters. Don’t forget to include time for advocacy and volunteer activities; both are an important part of your campaign.

Ideally, campaigns lasting two weeks have a good balance of impact and length. One exciting kickoff rally and/or 3-4 smaller rallies should provide your co-workers with key information they need to make an investment decision within the campaign time frame.

Shorter campaigns of a few days to one week can work when you are organized and have a track record of campaign success. These organizations likely have a highly engaged CEO and a strong connection to the community. You may hold one, all-encompassing rally, or 1-2 smaller rallies.

Larger organizations that need more time to engage a larger workforce can expect to hold between 5-10 rallies (or more for the largest corporations) and/or 2-3 special events. Spreading the fun over two weeks (or slightly longer) often works best in your organizational culture.

HERE’S A BRIEF TIMELINE HIGHLIGHTING STEPS:

5-6 WEEKS OUT
- Review last year’s performance and campaign materials with a United Way representative.
- Seek guidance for this year’s campaign goals from the CEO.
- Attend the Let’s Band Together: networking and knowledge event on August 27 or meet with United Way campaign staff.
- Start recruiting your internal campaign team and hold the first meeting.
- Educate your team members on United Way’s role in the community.

3-4 WEEKS OUT
- Develop a campaign plan.
- Decide on a theme and incentives, plus set kickoff and campaign wrap-up dates, volunteer activities, etc.
- Set a rally schedule; agenda and locations.
- Assign responsibilities and tasks to team members.
- Meet with your United Way representative and review campaign details.

1-2 WEEKS OUT
- Create energy, awareness and passion.
- Begin publicizing your campaign (posters, emails, fliers, employee newsletter, etc.)
- Send a CEO letter or email endorsing the campaign to all employees.
- Talk about United Way, the benefits of investing and your kickoff event to your co-workers.
- Review all plans for your kickoff event and pledge period with your campaign team.

CAMPAIGN WEEK(S)
- Hold rally, events, volunteer projects, etc.
- Distribute campaign materials during rallies, by email and through your newsletter, website or online portal.
- Host your campaign kickoff email.
- Create progress to your United Way representative.
- Collect pledge cards, hold drawings and giveaways for participating employees.
- Be available to your campaign team and all employees to answer questions.
- Submit pledge envelopes with non-payroll investments — such as cash, checks, and credit cards — on a weekly basis during the campaign. (You can submit multiple envelopes throughout your campaign.)

CAMPAIGN WRAP-UP
- Collect all remaining pledges and organization contributions.
- Arrange for the CEO to communicate the campaign’s success and thank employees. Or, send a customized thank you based on the template provided by United Way.
- Contact your United Way representative and schedule a pick up of your pledge envelopes and excess materials.
- Document the campaign for next year’s Campaign Ambassador.
- Thank your campaign team.