CAMPAIGN LEADERS GUIDE

A NOTE FROM YOUR CAMPAIGN CHAIR

Steven E. Schneider, M.D., M.B.A.
President, Saint Mary’s Hospital
2021/2022 United Way Campaign Chair

On behalf of our community, thank you so much for helping lead your organization’s United Way of Greater Waterbury campaign this year. We are grateful for your leadership and excited about all that is in store this year. You are joining a team of dedicated staff and hundreds of volunteers around the region as we work together to make Greater Waterbury a thriving place that every person in every neighborhood is proud to call home.

This guide is full of best practices used by campaign leaders like you around the Greater Waterbury area to run best-in-class workplace campaigns. We use these guidelines ourselves at Saint Mary’s Hospital, and our employees find them useful for creating engaging experiences. I strongly encourage you to connect with your United Way representative, to assist you in planning your United Way campaign.

I also invite you to take some time to review this year’s campaign messaging. I am inspired by United Way’s evolving approach to strengthening neighborhoods, and I think you will be too. United Way brings businesses, government, nonprofits, community leaders, and donors together to tackle the systemic issues that have afflicted our region in an unprecedented way. Together, we are providing individuals and families the tools necessary to reach their full potential. Everyone deserves a quality education, living-wage job, affordable healthcare, and access to basic needs. We are all working together to create communities where children and families can thrive. Thank you for joining us.

For additional information contact Chief Development Officer Tomeka Cole at TCole@unitedwaygw.org
Please include your company and contact information

CAMPAIGN COACHING

Karen Hinds
CEO
Workplace Success Group LLC
United Way Campaign Leadership Cabinet and Board Member

As a Campaign Leader, you have a unique opportunity to inspire as you harness the generosity, talent, and energy of your workplace to give back to our community and help United Way’s efforts in building a stronger, healthier Greater Waterbury Community with opportunity for all. We thank you for investing your time and passion to help local families in need reach their full potential.

We want to reciprocate by providing leadership coaching to all campaign leaders. Your role is critical to our success and this year’s coaching program will equip you with skills you can use to enhance your campaign experience and strengthen your overall leadership development.

Coaching Program Benefits

• Cultivate your personal leadership and communication style
• Learn techniques to motivate and influence with a captivating message
• Build power networks
• Learn about volunteer engagement

Thank you again for joining our United Way team. Together, we can Build the Bridge for thousands of people in our ten-town area who need a helping hand to cross the divide to a better life.

For additional information contact Chief Development Officer Tomeka Cole at TCole@unitedwaygw.org
Please include your company and contact information
## 5 STEPS TO RUNNING A SUCCESSFUL CAMPAIGN

### 1. Learn About Our Impact

We want to understand you and your goals and tell you more about our impact.
- Call your United Way representative to get started. They will help you create and manage a successful campaign.
- If you don’t know who your representative is, call us at 203.757.9855 x17 or email TCole@unitedwayww.org.

### 2. Plan Your Campaign

The keys to campaign success are preparation and teamwork. Having the right group of campaign volunteers will increase the success of your campaign and make your role much easier.
- Set campaign goals, objectives and a timeline, and identify and recruit your team.
- Identify pledge format (online, paper or both)
- Learn about various strategies to make your campaign fun and engaging. Call us, we have lots of ideas!

### 3. Inspire Co-Workers

Your campaign impacts real lives, and we can help you share those stories.
- Promote your campaign. Get your marketing and communications team involved!
- Help your team see the impact their gift creates by engaging in United Way’s year round volunteer opportunities (virtual options available) or ask us about United Way Affinity Groups.
- Share your own personal story about why you support United Way.

### 4. Make the Ask to Give

The number one reason people don’t give is that they were never asked.
- Kick off your campaign with a fun event featuring an energetic and inspiring ask to give!
- Have your company CEO participate by writing a letter or making a speech. CEO commitment and leadership is the #1 predictor of success.
- Ask for a gift peer-to-peer. Talk to us about asks that feel right for your team.
- Let us help you thank your donors. Remember, we can’t thank them if we don’t know them! Sharing data is encouraged!
- Review campaign results with your United Way team.
- Share the impact! Publicize the campaign results in your company newsletter, intranet, social media channels or a message from the CEO.

### 5. Thank Your Donors

- Train any campaign volunteers and ambassadors, your United Way representative can assist.
- Build excitement! Share United Way impact stories and videos internally
- Share calendar of events and incentives with all staff
- Host a fun and engaging kickoff event!
- Invite your CEO and United Way representative to talk about United Way’s impact
- Send an internal email campaign has kicked off
- Track progress and adjust strategies and incentives accordingly
- Send email reminders throughout campaign
- Continue sharing United Way impact stories

### Campaign Leader Checklist

#### Step 1: Prepare for Your Campaign

**Every Campaign is Different!** This chart is a sample timeline and checklist to help plan and execute your United Way campaign. Campaigns typically run 2 to 4 weeks. Contact your United Way representative for more information on how to plan a best-practice campaign.

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Core Best Practice</th>
<th>Bonus Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Meet with your United Way representative and any previous campaign team members to review successes and challenges from the previous year</td>
<td>Choose Leadership Giving and Affinity Group Ambassadors</td>
</tr>
<tr>
<td>2</td>
<td>Determine campaign dates, length, locations and fundraising goals, then confirm with your United Way representative</td>
<td>Develop communications and order campaign marketing materials through your United Way representative</td>
</tr>
<tr>
<td>3</td>
<td>Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities</td>
<td>Visit the Campaign Toolkit online at unitedwayww.org/get-involved/fundraising-toolkit to check out campaign resources, tools and templates</td>
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#### Step 2: Kickoff Your Campaign

<table>
<thead>
<tr>
<th>Step 2</th>
<th>Core Best Practice</th>
<th>Bonus Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Promote campaign theme, calendar of events and incentives, and recruit additional campaign committee members as necessary</td>
<td>Engage senior leadership to endorse your campaign through strategic special events</td>
</tr>
<tr>
<td>2</td>
<td>Brief executive leadership on key objectives of your campaign and secure CEO buy-in</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Talk to your United Way representative about on-site presentations</td>
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#### Step 3: During Campaign

<table>
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<tr>
<th>Step 3</th>
<th>Core Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Conduct a Leadership Giving reception or engagement activity</td>
</tr>
<tr>
<td>2</td>
<td>Conduct a Leadership Giving meeting with your United Way representative and make sure to discuss year-round engagement opportunities</td>
</tr>
<tr>
<td>3</td>
<td>Share final campaign fundraising total and don’t forget to thank and show appreciation to donors!</td>
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