

2019 Campaign Manager Action Guide

A step-by-step tool for your success!

Visit www.unitedwaytoledo.org/yourcampaign for additional resources.

Celebrating 100 Years of Driving Community Change.



www.unitedwaytoledo.org



You are a Changemaker!

Campaign Managers (CMs) are critical links between United Way of Greater Toledo (UWGT) and employees to help **change the story of so many** in Lucas, Wood, and Ottawa counties.

IN THIS ACTION GUIDE YOU'LL FIND:

- Step-by-step instructions to plan your campaign
- Ideas and tips to make campaign more engaging
- The best campaign tools to make the greatest impact

We hope you'll use this as the go-to resource for your campaign needs, but an Action Guide can only do so much. Your UWGT staff representative (UW Rep) is always available to help, so please reach out to us.

Your UW Rep contact is:

Phone: _____

Email: _____

YOUR GIFT TO UNITED WAY

Surrounds our community with support.

I would like to meet with a financial coach.

I am being abused.


I am trying to find a food pantry nearby.

I need substance abuse help.

I'm homeless and need to find a shelter.

I am seeking local volunteer opportunities.

I need legal counseling.

United Way 
2-1-1
Get Help. Give Help.

HEALTH INVESTMENT + EDUCATION INVESTMENT + FINANCIAL STABILITY INVESTMENT + DONOR DESIGNATIONS = STRONGER COMMUNITY

Campaign Manager Role

You're the right fit for the CM role if you...

- Want to expand your leadership skills
- Have a passion to create change
- Are a trusted colleague
- Embrace your company's culture of philanthropy
- Inspire others to make an impact in the local community!

Benefits of being a Campaign Manager:

- Grow your leadership, project management and public speaking skills
- Showcase your commitment & leadership to others in your company
- Collaborate with a diverse team of compassionate & talented co-workers

Be sure to check out the Campaign Manager Training Videos online at: www.unitedwaytoledo.org/yourcampaign !



LIVE UNITED

Campaign Best Practices

Strategies that produce the best results and have the biggest impact

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Campaign Best Practices

- Gain CEO/C-Suite support
- Form a UW partnership committee
- Set a company goal
- Hold a formal kick-off
- Feel comfortable articulating United Way's mission
- Utilize ePledge
- Offer a corporate match or corporate gift
- Engaging leadership level donor
- Thank donors
- Arrange agency tours for their employees
- Have effective communication with UW staff
- Offer year-round engagement opportunities for staff



Campaign Awards

As a bonus for planning a stellar campaign....
You could win awards!

Campaign Awards recognize your
commitment and implementation of best
practices as a Campaign Manager and
as a company.



Visit www.unitedwaytoledo.org/yourcampaign
for campaign award criteria details!

LIVE UNITED

Top 10 Action Steps

Now that you've brainstormed ideas to implement, take the next step in your planning!

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Top 10 Action Steps

1. Recruit a team
2. Determine year-round UW partnership goals and campaign timeline
3. Set a challenging, yet attainable, campaign goal
4. Plan your campaign activities
5. Schedule volunteer projects
6. Promote leadership level giving
7. Communicate with employees about the campaign
8. Don't forget to say "thanks!"
9. Finalize your campaign
10. Plan for your next engagement opportunity



LIVE UNITED

Campaign Timeline

Put strategies and action steps to a timeframe for realistic implementation

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4-6 Weeks Before Campaign

- Meet with your UW Rep
- Recruit a team of representatives from each department and schedule meetings
- Attend Campaign Manager Summit with your campaign team
- Meet with your company's CEO/Senior Management Team to:
 - Secure endorsement and commitment to participate in campaign events & volunteerism
 - Approval of campaign budget
 - Get confirmation on campaign goals and objectives
- Meet with your campaign team
 - Establish campaign goals, objectives and activity timeline
 - Finalize communication strategy
- Post information for employees to easily access
- Schedule United Way speaker(s) for staff meetings, kick-off and Lunch & Learns
- Work with UW Rep on pledge tools
 - Start ePledge set up and data file 6 weeks before kick-off**
 - Request pledge card pre-prints 4 weeks before kick-off**
- Send staff calendar requests to attend campaign events

1 Week Before Campaign

- Together with your UW Rep, provide your campaign team with training on United Way's LIVE UNITED 2020 goals, programming details, and engagement opportunities
- Send out CEO/Senior Management Team endorsement letters
- Reinforce campaign goals and incentives
- Send reminders about campaign kick-off and events

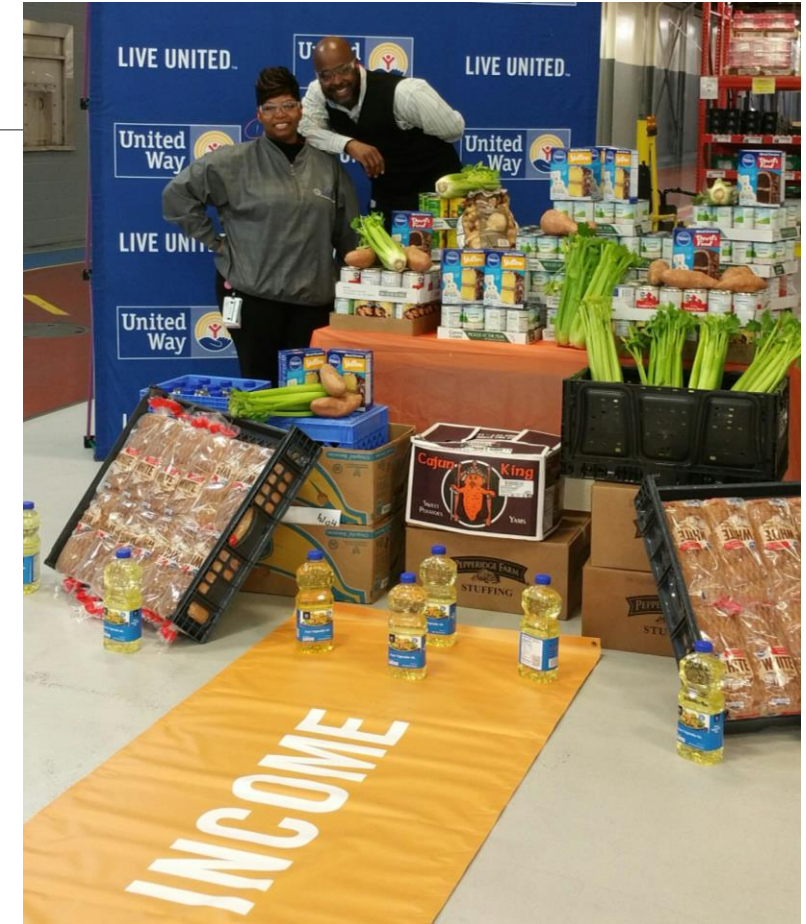
Week of Campaign Kick-off

- Host your campaign kick-off event and emphasize the endorsement of your company's leadership
- Conduct your campaign events
- Continue to promote your campaign
- Update employees on progress toward goal

Don't forget to HAVE FUN!!!

1-2 Weeks After Campaign

- If not utilizing ePledge, collect all pledge forms and submit campaign report to your UW Rep. The report should include a spreadsheet of your donors
- If utilizing ePledge, generate campaign reports to be submitted
- Thank your staff and those that donated
 - Host a thank you event
- Announce results to staff
- Conduct a debrief meeting with your UW Rep
 - Evaluate your campaign results
 - Identify opportunities for next year's campaign
 - Discuss year-round engagement & plan for your next engagement opportunity!



Important UWGT Contact Information

- **UWGT Rep Name:** _____ **Phone:** _____
- **UWGT Volunteerism:** Contact the Volunteer Center at volunteer@unitedwaytoledo.org or 419 244 3063
- **ePledge help, donor pledge questions:** Contact Donor Services at donor.services@unitedwaytoledo.org or 419-254-4667

THANK YOU

**for your commitment to our community
by serving as a Campaign Manager.**

Together, we are changing lives!