



United Way
of Warren County

2018

Campaign Account Manager Toolkit



CHANGE
STARTS HERE.
CAN WE COUNT YOU IN?



UNITED WE FIGHT. UNITED WE WIN.
LIVE UNITED

Welcome

Thank You! Account Managers are vital to the success of United Way's work in the community. You are the link to a world of important information and resources for our local business and organizational partners. You are the key to making workplace campaigns interesting, fun, and successful. People contribute their time and money to causes they know. This is why you are important as a link in achieving our mission of improving lives by connecting people, organizations, and resources to meet the needs of our community.

What is an Account Manager?

Staff Account Managers provide guidance to Workplace Employee Campaign Coordinators, and in doing so, help strengthen the United Way commitment to advancing the common good in Warren County by focusing on the building blocks of a good quality of life-**education**, **financial stability**, and **health**.

Benefits to you?

- Enhances comprehensive sales, management, and presentation skills
- Develops new contacts throughout the business community-sometimes making life-long friends
- Increases confidence and leadership skills – looks good on your resume'
- Deepens insight into community needs and resources – making a difference in someone's life

Benefits to United Way, Community, and Corporate Partners?

- Heightens awareness of the variety of critical community needs
- Develops leaders for United Way and its community partners



About Us

United Way of Warren County-About Us

- United Way of Warren County (UWWC) is an independent 501(c)(3) nonprofit with a corporate headquarters on Route 42 in Mason. We are managed and governed locally, by people who live and work in Warren County, (*not NYC, DC, or Cincinnati*). We are a member of United Way Worldwide, but we are locally controlled.
- UWWC provides funding to local nonprofit programs and initiatives focused on advancing education, financial stability, and health. Each of the 43 programs and 23 agencies, we fund, is reviewed annually to ensure both program need and effectiveness.
- The advantage of being local is that we know the needs of our community because we live and work here. All dollars raised stay in the county, unless donor-designated elsewhere, providing services for county residents only.
- UWWC will NEVER exert pressure to donate. 75% of our revenue is from individuals at companies supporting our annual campaign, through which employees can give a little each paycheck through payroll deduction and join 1000s of people doing the same

UWWC Strategic Community Impact Goals (effective June 2016)

These goals form the building blocks for a good quality of life. Research clearly shows that a quality education = better jobs and financial stability = better health. We approach these goals with a dual mindset of both **helping people in need AND demonstrating an economic impact.**

- Education Goal – School Readiness - Provide leadership to collaborative efforts to promote school readiness from preschool-eighth grade with a focus on literacy, academic achievement, and mentoring. (ex. preschool and kindergarten literacy)
- Financial Stability Goal – Workforce Development - Provide leadership to collaborative efforts to improve the skills/knowledge of Warren County residents to meet the needs of Warren County businesses. (ex. advanced manufacturing career awareness)
- Financial Stability Goal – Basic/Emergency Needs – Fund programs providing temporary emergency assistance and basic needs. (ex. food pantries)
- Health Goal – Prevention/Health Value - Provide leadership to collaborative efforts to improve health and wellness related to key determinants of poor health and health value. (ex. health value educational presentation series)

Campaign Account Management -Making a United Way Call/Meeting with ECC

Prepare for the Account Manager Call/Meeting

- Review your knowledge of United Way of Warren County - visit our website at www.uwwcoh.org
- Research your account(s)-visit their website, review your Profile Report. The Profile Report is a great way to see Corporate and Donor giving history as well giving statistics. Utilize Andar Account Bio Tab.
- Review your CAM Call Report & Summary Form to help prompt Questions of your ECC.

Make the Campaign Account Manager (CAM) Call/Agenda

- **THANK** for past support
- State the purpose of the call - **to secure a commitment to run a 2018 campaign and to obtain/confirm the name and contact information of your Workplace Employee Campaign Coordinator (ECC)**
- **Ask for a corporate gift, if none, or ask for an increase in corporate giving-encourage them to sign corporate card and return to United Way**
- Review the Profile Reports and Highlight employee giving and/or corporate giving
- Inquire about low, high, or unusual numbers. Discuss details of Special Events.
- Ask that the Workplace Employee Campaign Coordinator (ECC) attend ECC Training at United Way and provide them with an invitation. (See Events Tab on uwwcoh.org)(2 dates to choose from)
- Ask ECC to commit to the concept that each employee be given the chance to contribute by asking every employee (*100% Ask - No Pressure*)
- Encourage a meeting of employees for campaign presentations and show United Way video (online only - Youtube link. (uwwcoh.org - Campaign Resource Tab - United Way Video)
- Ask if the company provides payroll deduction as a giving choice (Payroll deduction is the best way to give)
- Be sure to answer all questions or assure that you will get the and get back to them.
- Respond to your ECC ASAP with any answers to questions.

Close the Account Manager Call/Meeting

- Leave the packet of materials (Corporate Card, Profile, ECC Training Dates)
- Secure and summarize the commitment(s) - Verbal or Written (letter, email, or note) Put a copy in the campaign account file folder.
- **Thank** the ECC/CEO for taking the time to speak with you and for their commitment to United Way

Follow up on the Account Manager Call/Meeting

- Encourage ECC to sign up for one ECC Training Session (send links via email)
- Report Details of your call/meeting to United Way by completing the CAM Call Report - UPDATE Your Account Status on your tab of the Campaign Tracking Sheet - Place a copy in your account file folder.
- **Communicate any concerns or positive information at the CAM TEAM MEETINGS. These meetings will be working meetings to discuss the status of all campaigns. Be prepared to provide updates at each meeting.**

After the Account Manager Call/Meeting - Administration Work

- Work with ECC through periodic checks and monitor the status of their campaign and corporate gift
- Remind ECC of upcoming deadlines to help keep them on track (August 29 - October 31)
- Assist ECC with goal setting, deadlines, planning of special events, speakers and additional materials
- **Report the status of each account on your TAB on the Campaign Tracking Sheet**
- Ensure that ECC completes a Campaign Report Envelope and submit their results with pledge forms etc., to United Way when their campaign is over
- Complete CAM SUMMARY FORM. Put copies of all correspondence in campaign account file and return the file to United Way Campaign Director.
- THANK YOUR ECC'S via email, thank you card, formal letter. There are numerous ways to say Thank You. The easiest way is to say...**THANK YOU!**

Campaign Enhancements

Campaign Agency Speaker

- Nothing tells the United Way of Warren County's story better than agency speakers. Refer to the Speaker Resource Booklet.

Retiree Involvement

- Retirees can greatly enhance a campaign's success. Many people are still interested in investing in United Way at the time of retirement. We encourage every corporate partner to extend an invitation to their retirees to join in giving to United Way.

New Hire Program

- Establish a program to invite new employees to give after the campaign season is over. Inform them of your organization's support of United Way and include the United Way brochure and pledge form in their new hire packet.

Testimonial

- Loyal Contributor and Employee Testimonials - Ask a coworker who has a personal experience with United Way to share their story. Employees who benefit from agency programs can inspire others with their compelling stories. Ask a coworker who has given to United Way for 10 or more years to share why they give.

Leadership Giving

- Encourage your coworkers to give a Leadership Gift to help create lasting community change.
- Alexis de Toqueville \$10,000+
- 4 Star General \$4,212 - \$9,999
- Lieutenant General \$2,132 - \$4,211
- Major General \$1,092-\$2,131
- Brigadier General \$520-\$1,091
- Officers Club \$365-\$519

Gold, Silver, & Bronze Award Level Giving

- Set a company goal of attaining Gold, Silver, or Bronze Award Level of giving, or try to increase your current level of per capita giving. The criteria is as follows: *Gold* \$165+ per capita, *Silver* \$85 - \$164 per capita, and *Bronze* \$35 - \$84 per capita.

Campaign Key Dates to Know – 2018

Activity	Due Date
June	
Campaign Account Manager Training at United Way (CAM)	June 14, 2018
Account Managers to begin Scheduling Calls on Accounts	June 15, 2018
Encourage ECC to sign up for Training in July or August June - July	June, 2018
July	
Account Managers Call on Accounts Completed	July 13, 2018
Account Manager Call Forms completed and CAM Tab updated	July 20, 2018
Employee Campaign Coordinator (ECC) Training	July 24 & August 1, 2018
August	
Account Managers-Deliver campaign materials to ECC who were unable to attend a training session	August 2 – 28
United Way Kickoff Event at Miami Valley Gaming in Lebanon	August 29, 2018
September	
Make Contact with your ECC's and report their status to United Way. <i>Ex. When is their campaign beginning and ending? What events will they hold? Etc. (CAM Summary)</i>	September 4 - 28
October	
Mid-point of Campaign - make contact and monitor & check status. <i>Ex. Does your ECC need your help setting up Agency Speakers, additional materials?</i>	October 1, 2018
Make Contact with your ECC's and report their status to United Way. <i>Ex. How much have they raised so far? When do they anticipate completing their campaign?</i>	October 8, 2018
One Week Until Target Campaign Completion Date	October 24, 2018
Target Campaign Completion Date	October 31, 2018
November	
Follow up on NON-FINAL accounts. Encourage ECC to finalize campaign and turn in their Campaign Report Envelope with all pledge forms enclosed. Campaigns are not complete until the Campaign Report Envelope (pledge forms & corporate card) is turned in to United Way.	by November 21, 2018
If your account is processed by a 3 rd party processor (GCL) check the UWW GCL Profile and find what date your Account Results will be available. Update your TAB on the Tracking Sheet	November-December 2018
December	
Participate in a Best Practice Study	December 2018
Account Managers complete "Campaign Summary Form" in detail and submit it to United Way with your Account Manager Account File Folder	December 14, 2018

United Way of Warren County

Campaign Glossary of Terms



United Way
of Warren County

Account	A company/organization which runs a United Way campaign.
Account Manager	Staff who work closely with Workplace Employee Campaign Coordinators (ECC) to advise, assist, and monitor the running of a company campaign as well as convey important information and upcoming dates and deadlines. The Campaign Account Manager reports the status of their account(s) at CAM Team meetings and updates the status on the Campaign Tracking Sheet
Allocation	Funds granted to an agency for specified programs.
Allocation Process	Process through which partner applications for United Way funds are reviewed to ensure that they meet identified community needs.
Campaign Director	United Way of Warren County campaign staff.
Corporate Gift	Annual contribution made in the name of the company, separate and apart from the employee giving.
ECC	Workplace Employee Campaign Coordinator is the employee(s) at each participating company/organization who works directly with their co-workers encouraging campaign participation and coordinating campaign activities. ECC's report their results to their assigned Campaign Account Manager.
Employee Goal	An established dollar amount or percent increase that represents the desired total contribution in an employee campaign. This amount should be based on potential growth for giving.
Kickoff Luncheon	The "formal" start of the campaign which receives community-wide attention.
Leadership Giving	A campaign effort that encourages gifts of \$365 or more annually to the general campaign fund. Recognition is authorized by employee by checking the appropriate box on pledge form.
Loyal Contributor	Loyal Contributors are donors who have given to <i>any</i> United Way consistently for 10 years or longer, regardless of gift size.
Per Capita Gift	The campaign measurement arrived at by dividing the combined total of the corporate, special event funds, and employee contributions by the total number of employees.
Special Event	Public or company event designed to attract positive attention to the campaign, keep the public informed, and motivate volunteers and donors. Examples are corn hole tournament, bake sale, employee carnival, dunking booth, ice cream social, etc.

Our Mission:

Our mission is to improve lives by connecting people, organizations and resources to meet the needs of the community.

Our Vision

United Way of Warren County will be the most recognized and trusted leader in the community for transforming quality of life in a proactive and collaborative manner.

United Way of Warren County Ohio – join us on:



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LIVE UNITED

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