



United Way of  
Waco-McLennan County

CHANGE DOESN'T HAPPEN ALONE

# CAMPAIGN COORDINATOR GUIDE



LOCAL GIVING.  
LOCAL IMPACT.

LIVE UNITED

# ABOUT UNITED WAY

## WHO WE ARE

United Way of Waco-McLennan County is a 501(c)3 nonprofit that fundraises locally to ensure local impact. We are a network of over 100 local businesses and thousands of local donors who come together annually to improve the quality of life for our residents in the way of health, education, financial stability and safety net services. We are dedicated to community-driven discussion and solutions. We continue to adapt to what this community needs us to be.

## WHAT WE DO

We are a convener, collaborator and funder. Local donations are invested in local programming through local nonprofits. It is the community who identifies the needs, and it is our Community Investment Councils who make the recommendation of where your donations should go. In 2021, we launched our Child Well-being initiative, a movement dedicated to understanding the indicators of quality of life for children and their families. We respond in times of crisis, developing ad hoc fundraising campaigns to provide customized and immediate relief.

## RECENT HISTORY

### **ANNUAL CAMPAIGN AND GRANT MAKING:**

Campaign coordinators like you came together despite the limitations of a pandemic, and formed a cohort of over 100 local companies, and thousands of individuals to support our continued efforts in grant making.

### **CHILD WELL-BEING LAUNCH:**

In 2021, we launched our 44 page report which looks to understand the status of our children in McLennan County from the perspective of local families. In 2022, we launched the action plan developed by community volunteers which will shape our work for several years.

### **LOANED EXECUTIVES:**

We relaunched our LE program in August 2022. As we approach 100 years of service in McLennan County, we hope the LE program will lead the way for the next 100 years. \*See LE booklet for additional information

## MISSION

United Way of Waco-McLennan County strengthens the community by mobilizing resources to measurably improve lives.

## VISION

United Way of Waco-McLennan County envisions a community where all people have the education, health, and financial stability needed to achieve their full potential.

# YOUR ROLE

As a Campaign Coordinator, you are essential to the Annual Campaign. You are building a stronger community in your workplace by planning, organizing, and coordinating a successful fundraising effort. You are the advocate for your company helping to improve lives by raising awareness with your colleagues and much-needed funds for investment in community programs and agencies. As a Loaned Executive, you serve as a liaison to many campaigns and support coordinators as they help shape the culture of giving at their organization.

## COORDINATOR ROLE

- Attend United Way Annual Info Session for Campaign Coordinators
- Serve as a liaison between your company's leadership and United Way staff
- Develop an effective campaign plan
- Recruit a team of coworkers to assist you
- Hold a campaign kickoff event
- Promote the campaign throughout your company
- Disseminate information throughout the year to your coworkers to ensure they know how their dollars are making an impact through United Way

## LOANED EXECUTIVE ROLE

- Serve as United Way Ambassador, encouraging Campaign Coordinators
- Attend campaign meetings as scheduled for essential skills training and professional development
- Oversee scheduling and conducting of employee group meetings for assigned accounts

### UTILIZE ONLINE RESOURCES

You can find a variety of helpful campaign resources on our website for your virtual or in-person campaign. Use these resources to enrich your campaign and make your job easier!

Videos

United Way graphics

Digital brochure & pledge form

Client success stories

Funded Partner Guide & Designation List

Follow us on Facebook, LinkedIn, & Instagram @UWWMC

Learn more at  
[www.UnitedWayWaco.org](http://www.UnitedWayWaco.org)

# CAMPAIGN CHECKLIST

✓	PLAN YOUR CAMPAIGN	TARGET DATE
	Attend United Way Info Session for Campaign Coordinators	
	Review the previous year's campaign performance, determine opportunities and challenges.	
	Meet with your CEO or leadership, determine your participation and monetary goals, incentives for giving, and get her/his personal endorsement.	
	Set a start and end date for your campaign	
	Recruit a Co-Coordinator or planning committee	
	Discuss strategies, themes, events and other details with United Way staff	
	Send a "Campaign Kickoff" invitation from your CEO endorsing and announcing the upcoming campaign	
	Promote your campaign	
	Visit our website any time for campaign materials	
	Coordinate with United Way staff to schedule speakers for your kickoff	
	HOLD YOUR CAMPAIGN	
	Hold kickoff event <ul style="list-style-type: none"> <li>• Make it easy with Sample Campaign Meeting Agenda</li> <li>• Show United Way Campaign video</li> </ul>	
	Make sure every employee receives the Community Report and Pledge Form	
	Publicize your campaign to employees and on social media	
	FINALIZE YOUR CAMPAIGN	
	Collect pledge forms, calculate results, and submit Campaign Report Envelope/Form with white copies of pledge forms to United Way <ul style="list-style-type: none"> <li>• Submit yellow copies to your payroll department</li> <li>• Donors keep the pink copies</li> </ul> For digital pledge forms, make extra copies for the payroll department and donors. Collect all digital files in one place and send to United Way at the end of your campaign.	
	Review your campaign results with your CEO and planning committee	
	Announce results with all employees	
	Thank all donors with a message from your CEO	



# TIPS FOR A SUCCESSFUL CAMPAIGN

## GET PEOPLE INTERESTED

78% of people are more likely to give a financial donation if they first have a positive engagement experience.

- **Share the story:** Educate employees by inviting a United Way guest speaker to share a story about the positive impact that donor dollars have on our community.
- **Learn first-hand:** Invite a representative from a United Way nonprofit partner to share about their program impacts.



## MAKE THE ASK

The #1 reason people don't give to United Way is because they were never asked.

- **Ask for the pledge:** With new donors, ask for a first-time gift. For annual donors, thank them for their past support and encourage an increase.
- **Answer questions and handle concerns:** Answer questions honestly and if you don't know the answer ask your United Way representative.
- **Leverage incentives:** Employee prizes and incentives are a way to thank employees for participating. No prize is too small. Vacation days, VIP parking, and gift cards are great incentives.
- **Say thank you:** Regardless of what the donor decides, thank them for their consideration.

## LIVE UNITED All Year Long

Businesses indicate that partnering with reputable nonprofit organizations enhances their brand. We provide you with all the tools you need to show donors how United Way is using their gift throughout the year.

- **Share updates:** Send email updates of client success stories and facts about United Way.
- **Connect on social media:** Advocate for United Way by posting photos throughout your campaign and connect with United Way for regular updates.



Remember to always say...

THANK  
YOU

# UNITED WAY SPEAKERS BUREAU

Personal stories of United Way's impact in our community bring to life the importance of giving. Our trained volunteer speakers include staff from our funded partner agencies who have communicated an interest to share their stories. Their five to seven minute presentations can help tell a more personal story at your campaign kickoff. Having a speaker at your kickoff is one of the most effective ways to reach the heart and minds of your coworkers. United Way speakers are available to speak to any size group. Ask United Way staff to help you book a speaker for your kickoff today!





# YOUR KICKOFF - MEETING AGENDA SAMPLES

## 10 MINUTE MEETING AGENDA

### A. Welcome (1 min) – CEO or Senior Leadership

- Brief introduction of why the meeting was called
- Distribute pledge forms with employee names

### B. United Way 101 (2 min) – Campaign Coordinator

- Focus on education, health, financial stability, and safety net services
- 23 funded partners (see *Community Report* or *Funded Partner Guide* for details)
- Your company's past participation and goal

### C. Show United Way Campaign Video (3 min) – Campaign Coordinator

### D. Wrap-up (4 min) – Campaign Coordinator

- Thank everyone for attending
- Ask coworkers to consider giving a donation
- Allow time for completion of pledge forms
- Collect pledge forms and answer questions (Be sure to announce the due date if collecting forms at a later date.)

## 20 MINUTE MEETING AGENDA

### A. Welcome (2 min) – CEO or Senior Leadership

- Brief introduction of why the meeting was called
- Distribute pledge forms with employees names

### B. United Way 101 (5 min) – Campaign Coordinator

- Focus on education, health, financial stability, and safety net services
- 23 funded partners (see *Community Report* or *Funded Partner Guide* for details)
- Your company's past participation and goal

### C. Show United Way Campaign Video (3 min) – Campaign Coordinator

### D. Guest Speaker (6 min) – Speakers Bureau Volunteer

### E. Wrap-up (4 min) – Campaign Coordinator

- Thank everyone for attending
- Ask coworkers to consider giving a donation
- Allow time for completion of pledge forms
- Collect pledge forms and answer questions (Be sure to announce the due date if collecting forms at a later date.)



# GIVING LEVELS

## Impact Donor

An annual gift of \$1-499 contributed to United Way qualifies a donor to be recognized as an Impact Donor.

## Leadership Society Donor

Leadership Society Donors are recognized as individuals who contribute \$500 or more annually to the United Way Annual Campaign. It's easy to encourage donors to add their name to this collective voice:

- All it takes is \$21 per pay check.
- Visit with your CEO about the importance of Leadership Society Giving. Consider holding a special meeting for Leadership Society Donors as a way to say "thank you."

## United Way Tocqueville Society Donor

Membership in the United Way Tocqueville Society is granted to individuals who contribute at least \$10,000 annually to United Way.

### PLEDGE FORM



United Way of  
Waco-McLennan County  
*CHANGE DOESN'T HAPPEN ALONE*

P.O. Box 7634 Waco, TX 76714  
(254) 752-2753  
www.UnitedWayWaco.org

Prefix	First Name	MI	Last Name	Suffix
Home Address		City	State	Zip
Employer		Actual Workplace Address		
Email		City	State	Zip

#### DONOR RECOGNITION

United Way may use your name in printed materials. Please select how you wish to be recognized.

- ☐ You may list me publicly as: (consider you and/or your partner)
- ☐ I wish my donation to remain anonymous.

#### DESIGNATED GIVING

- ☐ UNITED WAY GENERAL IMPACT FUND  
The most powerful way to invest your contribution is to invest where it is needed most, by advancing the common good of the McLennan County community.
- ☐ EDUCATION PILLAR ☐ FINANCIAL STABILITY PILLAR
- ☐ HEALTH PILLAR ☐ SAFETY NET SERVICES PILLAR
- ☐ UNITED WAY ELIGIBLE DESIGNATION PARTNER

\*If you would like to designate your gift directly to an agency, a minimum annual donation of \$100 is required. Designations to specific agencies will be assessed a 15% processing fee (maximum \$75). Designations to agencies not pre-approved on the United Way designation list will be redirected to a United Way impact pillar. Please visit [www.UnitedWayWaco.org](http://www.UnitedWayWaco.org) for a list of eligible agencies for designations.

Designated Agency Name

#### WAYS TO GIVE

- ☐ BECOME A LEADERSHIP SOCIETY DONOR  
An annual gift of \$500 or more (a minimum of \$21 per pay check) qualifies you to become a United Way Leadership Society Donor.

- ☐ BECOME AN IMPACT DONOR  
An annual gift of \$1-499 qualifies you to become an Impact Donor

- ☐ BECOME A FAIRSHARE DONOR

I want to contribute the following amount:

- ☐ 1% of my monthly salary
- ☐ 1 Hour of pay per month
- ☐ \$ \_\_\_\_\_ each pay period  
# of pay periods

- ☐ ONE-TIME GIFT

Please attach check made payable to United Way of Waco-McLennan County.

Total Amount Enclosed: \_\_\_\_\_

- ☐ Check # \_\_\_\_\_ ☐ Credit Card  
Number \_\_\_\_\_ Exp. Date \_\_\_\_\_ CVC \_\_\_\_\_

Total Amount of Pledge

\$ \_\_\_\_\_

Signature to Authorize Pledge

Signature \_\_\_\_\_ Date \_\_\_\_\_



# FREQUENTLY ASKED QUESTIONS

## Where does my contribution go?

All funds raised through the United Way Annual Campaign go into the United Way General Impact Fund, unless a donor designates to a specific organization or another United Way. On an annual basis, these funds are used to support grants made to highly qualified nonprofit organizations working to support community outcomes in the areas of education, health, financial stability, and safety net services. Dollars raised from this campaign directly benefit programs that serve McLennan County residents.

## Who decides how my gift is spent?

We authentically engage community partners, donors, organizations, experts, and residents in a meaningful and inclusive way through the volunteer-led Community Investment & Financial Review Council grant review process. The Councils are responsible for ensuring donor contributions are invested effectively in well-governed and well-managed local programs that are committed to high-impact outcomes. These Councils provide grant application review and funding recommendations to the United Way Board of Directors. The Board has final approval of all grant awards.

## What about the pressure to give?

UWWMC does not condone a workplace to pressure their employees to give. The decision to give is personal and up to each individual. No one should be pressured or coerced into giving.

## How much of my donation stays in McLennan County?

98% of your donation stays in McLennan County. 2% of your gift supports our United Way Worldwide annual membership fees which provides our local organization with staff training, national fundraising opportunities, marketing, and worldwide networking support.

## Can I designate my gift to a specific organization?

Yes, a donor may designate their gift to a funded nonprofit partner or an approved organization from our eligible partner list. Designations to an ineligible organization will be redirected to the General Impact Fund. The most powerful way to invest your contribution is to invest where it is needed most, by advancing the common good of the McLennan County community through the United Way General Impact Fund.

## As Campaign Coordinator, what if I get a question I don't know how to answer?

Don't be afraid to say you don't know. Get the person's name and phone number and contact the United Way office and a United Way staff member will follow up. United Way's website also offers extensive information. Visit us at [www.unitedwaywaco.org](http://www.unitedwaywaco.org) to learn more.

# UNITED WAY CONTACT INFO

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Administrative Service Manager

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Special thanks to mural artists: “Tree of Life” - Artist: Vincent Thomas

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**COMMUNITY WILL**

**COMMUNITY NEED**

**COMMUNITY INVESTMENT**