

**Internal Coordinator Training**  
July & August 2023

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**Purpose of Today:**

- Connect you with the mission of United Way and build excitement for our work
- Clarify your role as Internal Coordinator
- Help you begin your Campaign Plans for 2023 – 2024 using Best Practices

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**Introductions**  
**The Resource Development Team**

<p><b>Peggi Goss</b> <i>President &amp; CEO</i> 979-696-4483 x 101 pgoss@uwbv.org</p>	<p><b>Maggie Montoya Gray</b> <i>Development Coordinator</i> 979-696-4483 x 110 979-324-7658 (cell) mgray@uwbv.org</p>
<p><b>Kate Clair</b> <i>Development Manager</i> 979-696-4483 x 118 kclair@uwbv.org</p>	<p><b>Lauryn Wiens</b> <i>Operations Manager</i> 979-696-4483 x 108 lwiens@uwbv.org</p>

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## United Way of the Brazos Valley President & CEO

**Peggi Goss**



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## Campaign Cabinet Volunteer Team

<b>Max Crawford – Chair</b> <i>KBTX</i>	<b>Debbie Eller</b> <i>City of College Station</i>
<b>Martin Hooper</b> <i>Drifting Creatives</i>	<b>Steve Fullhart</b> <i>Blue Forge Alliance</i>
<b>Melissa Keeling</b> <i>Lincoln Lumber</i>	<b>Bonnie Poldo</b> <i>Spherion Staffing</i>

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## United Way of the Brazos Valley fights for the health, education and financial stability of every person in the Brazos Valley.

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## United Way Programs

Community Impact Grants

Early Literacy Program

Books & A Blanket

Youth Leadership Cabinet

Ride2Health

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## 2-1-1 Texas

- Trained, Certified Specialists
- Serves every county and every resident in Texas
- Available 24 hours a day
- Available in over 70 languages

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## 2023 – 2025 Community Impact Grant recipients

- Adult & Teen Challenge of Texas
- AggieLand Pregnancy Outreach
- Big Brothers Big Sisters of the Brazos Valley
- Boys & Girls Clubs of the Brazos Valley
- Brazos Valley Center for Independent Living
- Brazos Valley Council on Alcohol and Substance Abuse
- Brazos Valley Rehabilitation Center Inc.
- Bryan/College Station Habitat for Humanity
- Catholic Charities of Central Texas
- Easter Seals of Greater Houston, Inc.
- Family Promise of Bryan-College Station
- Grimes Health Resource Center
- Health For All
- Madison Health Resource Center
- North Bryan Community Center
- OnRamp
- Project Unity
- Ronald McDonald House Charities of Central Texas
- Scotty's House
- Sexual Assault Resource Center
- Son-Shine Outreach Center
- SOS Ministries
- Texas Ramp Project
- The Prenatal Clinic
- The REACH Project
- Twin City Mission
- Unbound Now
- Voices for Children CASA of Brazos Valley

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## Supporting United Way...

- Allows any person to be philanthropic and shows the power of **collective giving!**
  - \$1 to United Way adds up to millions
- Gives donors the opportunity to maximize their giving through one gift



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# LIVE UNITED

## 2023-2024 Community Campaign

Internal Coordinator Role

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## Role of the Internal Coordinator

- Serves as the liaison between your company's employees and United Way – **even more critical now**
  - Connect co-workers to United Way's mission and work
- Coordinates Campaign Efforts, communicates adaptations
  - Be the **point person** to get materials where they need to go!
    - Distribute to employees → Collect from employees → Get to HR for processing → Send results to United Way
  - Provide engagement activities throughout the year
  - Keep the United Way Campaign **fun** and **impactful!**

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## 2023-2024 Community Campaign

**General Timeline**

- Fall 2023: Campaigns (Sign up/Pledge Period)
- Spring 2024(April): United Way finalizes reports and campaign numbers
- Jan 2024 – Dec 2024: Collection of Pledges

**Work with companies to run Employee Workplace Campaigns**

- Employees invest a portion of every paycheck (through payroll deduction) in our community
- Most are managed locally, some are not

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## 2022-2023 Community Campaign

Campaign Type	Goal	2022 Current	Remaining	% of Goal
<b>Workplace</b>				
Community Giving & Events	\$450,000.00	\$381,457.56	\$68,542.44	84.77%
• Kickoff				
• KBTX Telethon				
• Fight to Unite				
• Community Giving and Direct Mail				
Sponsors				
• Campaign Kick-off				
• Fight to Unite				
• Telethon	\$68,000.00	\$60,538.46	\$7,461.54	89.03%
SECC	\$500,000.00	\$486,087.84	\$13,912.16	97.22%
Grants	\$400,000.00	\$480,126.14	\$(80,126.14)	120.03%
<b>TOTAL:</b>	<b>\$1,638,000.00</b>	<b>\$1,537,492.09</b>	<b>\$100,507.91</b>	<b>93.86%</b>

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## Planning Your Company's United Way Campaign

Best Practice Activities

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## Campaign Best Practice Checklist

- Secure Leadership Support
- Build Your Team
- Connect with United Way's Mission
- Set the Fundraising Goal
- Plan the Campaign Activities
- Execute the Plan
- Report Results to UWBV
- Thank and Acknowledge
- Engage Throughout the Year

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## Three Phases of Campaign

Planning Campaigning Celebrating

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## Secure Leadership Support

- Critical to the success of your efforts
- Have Company Leadership share words of support
  - Letter/email
  - Short, informal video message
  - Speak at rallies
- Check with Leadership for
  - Giving Incentives (Fair Share Day (1% giving), Drawing Prizes, etc.)
  - Corporate Match and/or Gift

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## Build Your Campaign Team

- Campaign Team helps ensure the Campaign reaches all corners of your company!
- What is appropriate for your company size and structure?
  - United Way Chair/Champion
  - United Way Committee
    - 1 person from each department/campus/branch office
    - Roles with different focuses (rallies, fundraisers, logistics)
- Helpful to have support when you can't all be together in the same place at the same time



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## Connect with the Mission & Agency Tours

- Connect your planning team to United Way's mission
  - United Way Staff are happy to meet with you to help! In-person or via Zoom/Conference Call.
- Partner Agency Tours
  - The **best way to see** United Way's Impacts
  - Virtual option available through our Campaign Toolkit webpage
    - 2 – 4 minute video highlighting organization and program
    - Recommend sending 2 – 3 links to employees or one link per week/communication touchpoint



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## Setting the Goal

- Use historical giving information, don't forget to stretch a bit
  - Available from United Way
- Tips on setting goals
  - Financial Goal – people need something to aim for and reach
  - Participation Goal – 100% asked instead of 100% giving



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## Plan the Campaign Activities

Types of Activities

- Pledged Giving through Payroll Deductions from Employees
  - can be 100% paperless
- Corporate Gifts and/or Match
- Employee Fundraisers and Incentives

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### CAMPAIGN CHECKLIST

**0-5 Weeks - Before Kickoff**

- Arrange a meeting with your United Way of the Brazos Valley representative
- Develop a campaign committee
- Review campaign plan with campaign
- Meet with HR and obtain CEO support of campaign

**6 Weeks - Before Kickoff**

- Complete meeting of campaign committee to set goals, establish campaign themes, plan events and develop a Leadership
- Develop marketing and press
- Develop publicity and education plan

**8-10 Weeks - Before Kickoff**

- Set plan for the Leadership meeting & campaign kickoff
- Confirm all meeting arrangements with representative and United Way representative
- Schedule time of United Way of the Brazos Valley meeting with your United Way representative
- Arrange for an agency speaker with your United Way representative

**1-2 Weeks - Before Kickoff**

- Meet campaign committee
- Send CEO letter request to all employees
- Meet your HR partner regarding payroll deduction enrollment and management with HR
- Contact local United Way of the Brazos Valley agency facilities
- Review campaign plan

**Campaign Kickoff & Employee Meetings**

- Hold employee kick-off meeting with CEO, committee, union, agency speakers and United Way representative
- Address needs of Leadership campaign
- Conduct employee group meetings
- Coordinate follow up with each employee - (see parent slide)
- Report progress to employees
- Give award gift and incentives in drawing for those who have returned pledge forms

**Campaign Wrap up**

- Hold special event
- Conduct final meeting with campaign committee and union
- Prepare report materials and recommendations for next year's Internal Coordinator
- Meet with CEO and report final results
- Review HR report to employees
- Thank and recognize contributors

**Final Report**

- Submit United Way campaign report to United Way office
- Submit Leadership List to United Way for recognition in Leadership Registry

### CAMPAIGN NOTES

MY UNITED WAY REPRESENTATIVE: NAME \_\_\_\_\_ PHONE \_\_\_\_\_

CAMPAIGN DATES: \_\_\_\_\_

CAMPAIGN GOAL: \$ \_\_\_\_\_



CAMPAIGN COMMITTEE MEMBERS: \_\_\_\_\_

SPECIAL EVENTS: \_\_\_\_\_

INCENTIVES: \_\_\_\_\_

KICKOFF / PRESENTATIONS SCHEDULED: \_\_\_\_\_

NOTES: \_\_\_\_\_

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## Campaign Tools and Materials

### Campaign Toolkit

- <https://unwv.org/campaign-toolkit/>


### Internal Coordinator Guide

- "Campaign Notes" Worksheet – pg. 11

### Materials

- Pledge Forms, Pledge Envelope
- Info Cards
- Posters
- Thermometer Posters
- Pens, Chip Clips, Stickers
- Thank You Notes

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## Pledge Forms

- Paper Pledge Forms or Digital Pledge Forms (customizable)
- Methods to Give
  - Payroll Deduction
  - One-Time Gift of cash, check, credit card or payroll deduction
- UWBV's Paper Pledge Forms (Triplicate Copies)
  - Payroll Office – White Copy
  - United Way – Yellow Copy
  - Donor – Pink Copy

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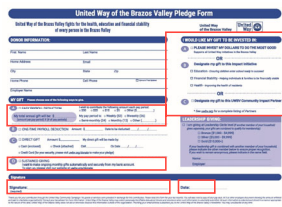
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## Pledge Form



- New options in "My Gift" section
- Confirm "Paychecks Per Year" is accurate
- Confirm a "Total Annual Gift" is completed
- Designation Options
- *Please make sure donor signs form*
- Make sure donor and United Way get a copy of pledge form

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## Campaign Rally

**Outline – Ideally 10 to 15 Mins**

- Intro / Company Perspective
- UWBV shares United Way message
  - Show Campaign Video (optional)
- Agency Speaker shares Impact Testimonial
- *Invitation to Give* by UWBV Staff, Company Leadership
  - Review Pledge Form details

**Checklist**

- Who will conduct the intro – Leadership or Internal Coordinator?
- Schedule with United Way: United Way Rep and Agency Speaker
- A/V Available?
- Materials: Pledge Forms, Pens, etc.
- Who will make the ask – UWBV or Leadership?
- Submission information and deadlines

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## Submit Results to United Way

1. Complete Pledge Envelope information and tallies
  - Ensure all pledge and gift information is complete and enclosed
  - Pledge Forms, cash, checks, etc.
  - Can be 100% paperless and submitted via Toolkit Webpage
2. Seal envelope and initial across flap
3. Deliver to United Way
  - Mail (please do not mail cash) *or*
  - Drop off: Monday – Friday, 8:30 am – 5:00 pm *or*
  - Call for pick-up from United Way



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### WHEN COMPLETED, PLEASE FORWARD TO UNITED WAY IMMEDIATELY!

Company \_\_\_\_\_ No. of Employees \_\_\_\_\_  
 Billing Address \_\_\_\_\_  
 City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone Number \_\_\_\_\_  
 Name of Preparer of Report \_\_\_\_\_  
 Email \_\_\_\_\_  
 This report is:  Partial (additional reports to follow)  Final



United Way  
 of the Brazos Valley  
 1716 Birchwood Dr., Suite 155  
 Bryan, TX 77802  
 979-696-4463  
 www.united.org

Instructions: Please complete the following chart for only the information enclosed in this envelope.

1	Giving Option	Total Pledge Amount Enclosed (\$)	# of Givers	Instructions
a)	Payroll Deductions			A. Forward Yellow copy of Pledge Form to Payroll Dept. B. Enclose Yellow copy of Pledge Form to United Way
b)	Cash/Checks/One-time Gifts			A. Enclose Yellow copy of Pledge Form & cash/checks B. Forward Pink copy of Pledge Form to United Way
c)	Credit Card Gifts			A. Enclose Yellow copy of Pledge Form with all credit card information B. Forward Pink copy of Pledge Form to United Way
d)	Other (Online Gifts)			A. Enclose Yellow copy of Pledge Form to United Way B. Forward Pink copy of Pledge Form to United Way
e)	Fundraisers / Special Events			A. Enclose Yellow copy of Pledge Form to United Way B. Enclose List of Donations needed to complete order form each, if multiple
2	Sub Total			Sum of lines a + b + c + d + e
3	CORPORATE GIFT / MATCH		N/A	Enclose copy of Pledge Form to United Way
4	GRAND TOTAL			Sum of lines 2 + 3

THANK YOU!!

Signature of Preparer: \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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## Celebrate, Thank and Acknowledge

- Promote results to your co-workers to celebrate your success!
- Send thank you notes, gifts to United Way Team members, payroll staff
- United Way Acknowledgements:
  - Gifts through Payroll Deduction – Pledge Form, Thank You Card
  - Cash, Check, Credit Card Gifts – Letter



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## Engage Throughout the Year

- United Way engagement can be *all year long!*
- Get a team together for volunteer events
  - Boo! Book Bash – October
  - Jingle Book Bash – December
  - Host your own Book Drive in the spring
  - Join a United Way committee
    - Campaign Cabinet
    - Grant Review Panel
    - Board of Directors
  - Day of Action – June 21<sup>st</sup>

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## Checklist for HR/Payroll

- Prepared for Payroll Deductions in payroll system
- Confirm dates Payroll Deductions will begin/end
- Confirm payment to UWBV method
  - Mailed directly from your site or another location/United Way
  - Does UWBV need to provide invoice/documentation to issue payment?
- Received a copy of all payroll deduction pledge forms at the end of pledge period

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 **HEALTH For All**  
**Liz Dickey**  
*Executive Director*

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## Next Steps

- Contact Kate Clair to schedule a planning session for your campaign
  - Email [kclair@uwbv.org](mailto:kclair@uwbv.org)
  - We will review planning ideas with you and help you in your efforts
- Build your team and engage your Leadership
- View Partner Agency Video Tours and Campaign Rally Videos



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## Volunteer Opportunities

### Book Bashes

- Back to School
- Halloween
- Christmas
- Easter

### Ride2Health

Day of Action – June 21<sup>st</sup>

Storage Organizing – Organizing our donated books in our storage facility



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