

Festival of Lights Auction

Volunteer Roles

- Help solicit items for the annual Festival of Lights Auction held in November

Strategies & Timeline

1. Contact businesses who have donated previously
2. Solicit non-contributory UW businesses to donate auction items
3. Organize donations into baskets and prepare them for the event

Donor Satisfaction/Thank You

Volunteer Roles

- Help thank high-profile donors
- Be willing to make phone calls thanking donors for their generosity
- Be willing to hand-write thank you notes to donors
- Hand deliver thank you notes or window clings to area businesses that are participating with United Way
- Brainstorm ideas about enhancing the way we say thank you.

Strategies & Timeline

Leadership Donor Recognition – September through January

1. Develop and execute a thank you strategy to personally thank all leadership and large corporate donors
2. Consider additional types of leadership recognition
3. Either a hand-written letter and/or personal phone call from a UW volunteer

Corporate Donor Recognition – ASAP through January/February

1. Identify potential functions that would make for good recognition/social affairs for the annual Campaign Awards event
2. Develop sponsorship opportunities to pay for the event
3. Help United Way ‘plan the party’

General Donor Recognition – September through January

Develop strategy for thanking as many non- keel club donors as possible

Via e-mail?

Can occur with distribution of acknowledgement/receipt, but is year-end too late?

Increasing reach of quarterly newsletter/ monthly e-newsletter

1. Currently have a mailing list of about 850 names (all donors of \$250 and above) and 1,900 e-mail addresses for these publications.

Established Campaign Accounts

Volunteer Roles

- Assist with follow-up calls to these United Way- friendly businesses and gather information to prep the campaign
- Help plan and execute the Campaign Kickoff event(s)
- Assist in distribution of campaign materials to participating workplaces
- Willingness to help conduct/coordinate United Way campaign at own workplace
- Be available to help large workplaces conduct their United Way campaign via behind-the-scenes work and attendance at their campaign events
- Willingness to speak about United Way during campaign presentations
- Help plan and execute the Campaign Awards event

Strategies & Timeline

1. Initiate contact with targeted workplaces that ALREADY support United Way but whose campaigns need improvement. – June through August
 - Set up and conduct meetings with CEO and/or ECC's to begin workplace campaign planning in these workplaces.
2. Kickoff Events for all existing workplace campaigns – mid to late August
 - Invite all CEO's and/or ECC's
 - Includes a breakfast event TBA
 - Includes a lunch event TBA
 - Prep campaign packets for all workplace campaigns
 - Includes prep of all campaign materials, such as: Brochures, Pledge Forms, Posters, Giveaways, Care Card promotion, Auction promotion, Envelopes, ECC Campaign Guide
 - Prepare website with all necessary 'Campaign on Demand' information
3. Workplace Campaigns – mid-August through November
 - Workplace Campaign Pre-mailings – prior to kickoff of select campaigns:
 - Includes a personal letter mailed to the home of each investor from last year. Recaps what they gave last year.
 - Details Care Card promotion if they gave under \$100 and details Leadership Giving possibilities if they gave \$250 or more last year.
 - Will go to Honda and other 'hard-to-reach' campaign accounts such as the State of Ohio CCC, Parker, etc.
 - Workplace Campaign Presentations
 - Includes actual speaking engagements and presentations for groups.
 - Workplace Campaign Events
 - Includes providing helping hands and/or attendance for their special UW events, preparations, and recognitions.

Residential Campaign

- Assist in assembling of campaign materials
- Identify the areas of the county where mailing should be sent

Strategies & Timeline

Mass-mailing piece – July to September

1. Create new mass-mailing appeal with give-back mechanism to be mailed one-time to as large a portion of the community as possible.
2. Mailing to be sent out in early September (after Labor Day)

Targeted letters to past residential donors – October and November

1. Mail personal letters for support to past donors who did not respond to the mass-mailing piece.
2. A 3rd mailing would go out in November

New Account Development

Volunteer Roles

- Assist in development of campaign materials
- Help get United Way 'in the door' at businesses that do not currently support the organization via your own personal and professional contacts
- Make United Way materials available to those you do business with
- Provide United Way with contact information (if appropriate)
- Schedule meetings with yourself, the potential client, and United Way staff to discuss the business's potential involvement with United Way
- Help in 'cold calling' of businesses that do not support United Way
- Willingness to speak about United Way during campaign presentations
- Help develop new creative strategies for reaching these investors

Strategies & Timeline

Targeted Workplaces – June through December

1. Identify large or potentially high-performing workplaces that do not currently support United Way (start with top 30-40)
2. Develop a list of contacts at those businesses
3. Contact businesses and schedule 15-20 minute meetings so a volunteer and UW staff member can talk with company about supporting United Way
4. Move them into the category of Established Workplace Accounts and follow that timeline

New/incoming Businesses & Developers – year-round

1. Identify incoming businesses and developers and attempt to begin a relationship with them before or very soon after they arrive in town
2. Develop a list of contacts at those businesses
3. Contact businesses and schedule 15-20 minute meetings so a volunteer and UW staff member can talk with company about supporting United Way
4. Move them into the category of Established Workplace Accounts and follow that timeline

Professionals

1. Identify groups and associations that would be beneficial to speak to.
2. Get on the meeting agenda of these organizations during the United Way campaign
3. Includes: physicians, medical, attorneys, financial, accountants, realtors, insurance agents.
4. Target high-profile professionals for event sponsorship opportunities and/or Pillar Society Membership

Leadership Giving

Volunteer Roles

- Brainstorm ways to establish/increase the benefits of membership in the Keel Club
- Target potential Pillar Society members, including current donors who give \$250+
- Help plan, coordinate, and execute Keel Club events

Strategies & Timeline

Identification of ACI's and potential Keel Club Members – June through July

1. Contact active community investors County Auditor's office (for lists of property tax values) and County Board of Elections (for lists of active voters) and mesh them together to form database of potential big givers

2. Brainstorm additional ways to find Active Community Investors

Targeted solicitation piece – June through August

1. Design a Leadership Giving piece to be mailed to all current Keel Club members in their pre-campaign mailing – August
2. Keep on hand for solicitation of potential Keel Club members during workplace campaigns.
3. Identify potential Keel Club Members in the residential campaign and mail to them.

Coordination of Keel Club event(s) – ASAP through January/February

1. Identify potential functions that would make for good recognition/social affairs (typically a post-campaign recognition in conjunction with Campaign Awards)
2. Develop sponsorship opportunities to pay for the event
3. Help United Way ‘plan the party’