

WORKPLACE CAMPAIGN COORDINATOR GUIDE



United Way of
Waco-McLennan County

Changing Lives

Last grant cycle, through United Way funded programs...



16,575 individuals experiencing family crisis and domestic violence had access to shelter, counseling, legal advice and basic needs.



5,478 adults, pregnant women & children received medical care, mental health services and prenatal care.



468 children participated in year-round, free educational opportunities.



240 individuals gained new job skills, earned their GED and improved their financial literacy.

...and much more!



Neighbors Helping Neighbors

Over 100 local businesses and thousands of local donors come together through United Way.



15 local companies provided Loaned Executives this year.

23 McLennan County nonprofit programs became United Way funded partners this year.



98% of donations stay in McLennan County.

\$1 million awarded in the current grant cycle.



45 local nonprofits are United Way designated agencies.

Over \$100 million has been invested into the community in our 100 years.



35+ partner organizations are coming together to improve child well-being



To find out more about how you can effect change in your corner of the world, visit:



UnitedWayWaco.org

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 lift the community voice and create a place where everyone belongs and has the opportunity to live their best life. We are dedicated to community-driven discussion and solutions in the areas of health, education, financial stability, and safety net services. We continue to adapt to what this community needs us to be.

Annual Campaign and Grant Making

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

Loaned Executives

For almost 70 years, United Way Worldwide has utilized loaned executives as a way to further the mission of taking care of local communities. This is the third year our Loaned Executive Program will be supporting our community efforts! Loaned Executives participate in team building and training to expand their skills as the next generation of diverse leaders in our community. They will also visit with our Community Partners to see firsthand how United Way of Waco-McLennan County and our funded partners help improve the quality of life for many of our most vulnerable residents.

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 and improving the 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.

Child Well-Being Movement

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. In 2023, we launched workgroups to help identify and promote existing community resources to ensure information is getting to those in need.

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.

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



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

[Digital brochure & pledge form](#)

[Funded Partner Guide & Designation List](#)

[United Way graphics](#)

[Client success stories](#)

[Follow us on Facebook, LinkedIn, & Instagram @UWWMC](#)



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

CAMPAIGN CHECKLIST

Plan Your Campaign

Target Date

<input type="checkbox"/>	Attend United Way Info Session for Campaign Coordinators	
<input type="checkbox"/>	Review the previous year's campaign performance, determine opportunities and challenges.	
<input type="checkbox"/>	Meet with your CEO or leadership, determine your participation and monetary goals, incentives for giving, and get her/his personal endorsement.	
<input type="checkbox"/>	Set a start and end date for your campaign	
<input type="checkbox"/>	Recruit a Co-Coordinator or planning committee	
<input type="checkbox"/>	Discuss strategies, themes, events and other details with United Way staff	
<input type="checkbox"/>	Send a "Campaign Kickoff" invitation from your CEO endorsing and announcing the upcoming campaign	
<input type="checkbox"/>	Promote your campaign	
<input type="checkbox"/>	Visit our website any time for campaign materials	
<input type="checkbox"/>	Coordinate with United Way staff to schedule speakers for your kickoff	

Hold Your Campaign

Target Date

<input type="checkbox"/>	Hold kickoff event <ul style="list-style-type: none"> ◆ Make it easy with Sample Campaign Meeting Agenda ◆ Show United Way Campaign video 	
<input type="checkbox"/>	Make sure every employee receives the Campaign Materials and Pledge Form	
<input type="checkbox"/>	Publicize your campaign to employees and on social media	

Finalize Your Campaign

Target Date

<input type="checkbox"/>	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"> ◆ Submit yellow copies to your payroll department ◆ Donors keep the pink copies 	
<input type="checkbox"/>	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.	
<input type="checkbox"/>	Review your campaign results with your CEO and planning committee	
<input type="checkbox"/>	Announce results with all employees	
<input type="checkbox"/>	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 United Way or a 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.

- ◆ **Sign up for our Living United Newsletter:** Visit our website to subscribe for monthly updates about our local impact.
- ◆ **Share updates:** Share our newsletter and other success stories and facts about United Way with your coworkers.
- ◆ **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



SECOND CENTURY CLUB

As we embark on our second century of service, the United Way of Waco-McLennan County proudly introduces the **Second Century Club**. This exclusive giving society honors the remarkable achievements of our first hundred years while igniting excitement for the incredible potential of the next century.

The Second Century Club invites businesses and individuals to join us in making a lasting impact. Our goals include welcoming 200 new businesses to contribute at least \$2,000 annually, with an emphasis on a three to five-year commitment, ideal for smaller companies or those not holding a campaign. Additionally, we encourage individuals to pledge a minimum of \$200 annually, with a similar long-term commitment. For larger companies, the target is to have at least 100 employees each contributing \$200 per year.

Membership in the Second Century Club offers unique perks and benefits, renewing annually, and embodies the United Way philosophy of collective good. Together, we can make our community stronger and ensure a brighter future for all.



YOUR KICKOFF MEETING SAMPLE AGENDAS

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
- ◆ Share about United Way Funded Partners and Designated Agencies (see our website 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
- ◆ Share about United Way Funded Partners and Designated Agencies (see our website for details)
- ◆ Your company's past participation and goal

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

D. Guest Speaker (6 min) – United Way or nonprofit representative

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."

Second Century Club

The **Second Century Club** celebrates United Way of Waco-McLennan County's legacy and future by inviting businesses to pledge \$2,000 annually and individuals to pledge \$200 annually.

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. This exclusive giving society offers unique perks and embodies our commitment to collective community strength and progress.

Sample Pledge Form

PLEDGE FORM				
Prefix	First Name	MI	Last Name	Suffix
Home Address	City	State	Zip	Phone
Employer	Actual Workplace Address	City	State	Zip
Email				
DONOR RECOGNITION				
United Way may use your name in printed materials. Please select how you wish to be recognized.				
<input type="checkbox"/> You may list me publicly as: (consider you and/or your partner)				
<input type="checkbox"/> I wish my donation to remain anonymous.				
DESIGNATED GIVING				
<input type="checkbox"/> UNITED WAY GENERAL IMPACT FUND <small>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.</small>				
<input type="checkbox"/> EDUCATION PILLAR <input type="checkbox"/> FINANCIAL STABILITY PILLAR				
<input type="checkbox"/> HEALTH PILLAR <input type="checkbox"/> SAFETY NET SERVICES PILLAR				
<input type="checkbox"/> UNITED WAY ELIGIBLE DESIGNATION PARTNER <small>*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 (minimum \$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 for a list of eligible agencies for designations.</small>				
Designated Agency Name _____				
WAYS TO GIVE				
<input type="checkbox"/> BECOME A LEADERSHIP SOCIETY DONOR <small>An annual gift of \$500 or more (a minimum of \$21 per pay check) qualifies you to become a United Way Leadership Society Donor.</small>				
<input type="checkbox"/> BECOME AN IMPACT DONOR <small>An annual gift of \$1-499 qualifies you to become an Impact Donor.</small>				
<input type="checkbox"/> BECOME A FAIRSHARE DONOR <small>I want to contribute the following amount:</small>				
<input type="checkbox"/> 1% of my monthly salary				
<input type="checkbox"/> 1 Hour of pay per month				
<input type="checkbox"/> \$ _____ each pay period				
_____ # of pay periods				
<input type="checkbox"/> ONE-TIME GIFT <small>Please attach check made payable to United Way of Waco-McLennan County.</small>				
Total Amount Enclosed: _____				
<input type="checkbox"/> Check # _____ <input type="checkbox"/> Credit Card				
Number _____ Exp. Date _____				
<input type="checkbox"/> Cash CVC _____				
Total Amount of Pledge \$ _____				
Signature to Authorize Pledge _____ 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 to learn more.

Annually, over 22,500 of your McLennan County neighbors are helped by nonprofits we fund:

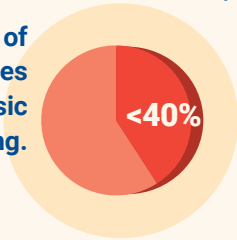


Financial Stability

Focuses on individuals' financial resiliency and workforce development.

- Christian Women's Job Corps of McLennan County
- Community Loan Center of the Heart of Texas
- Grassroots Community Development
- Greater Waco Legal Services
- Heart of Texas Goodwill Industries, Inc.
- NeighborWorks Waco
- Waco Habitat for Humanity

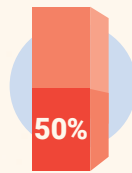
More than 40% of McLennan County homes earn less than the basic cost of living.



Education

Provides supportive classes and groups for caregivers, family connectivity to local schools, and equitable access to educational opportunities.

Less than 50% of students entering McLennan County public schools are kindergarten-ready



- Advocacy Center for Crime Victims and Children
- Art Center Waco
- Care Net Pregnancy Center of Central Texas
- Communities in Schools of the Heart of Texas
- Family Abuse Center
- Girl Scouts of Central Texas
- Greater Waco Legal Services
- Greater Waco YMCA
- Inspiración
- Mentoring Alliance
- STARRY, Inc.
- Talitha Koum Institute
- The Arc of McLennan County
- The Cove, Heart of Texas
- Transformation Waco
- VOICE Inc.
- Youth Connection Inc.

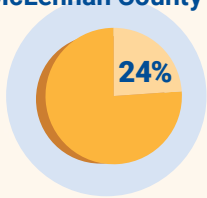


Safety Net Services

Support essential services and emergency interventions:

- Advocacy Center for Crime Victims and Children
- American Gateways
- American Red Cross – Heart of Texas Chapter
- Caritas of Waco
- CASA of McLennan County
- Central Texas Youth Services Bureau
- Community Cancer Association
- Compassion Waco
- Family Abuse Center
- Foster Village Waco
- Friends for Life
- Isaiah 117 House
- Lovely Village
- McLennan County Pack of Hope
- Meals on Wheels Waco
- Mission Waco Mission World
- The Salvation Army Waco
- Waco Shepherd's Heart

Food insecurity impacts almost a quarter of children under the age of 18 in McLennan County

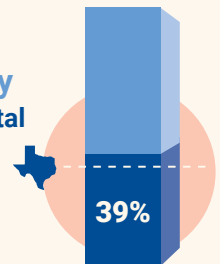


Health

Increases awareness and availability of healthcare services reaching underserved communities.

- Ascension Providence Foundation
- Baylor Scott & White Central Texas Foundation
- Community Doulas of Waco
- Greater Waco Sports Commission
- Heart of Texas Behavioral Health Network
- La Puerta
- Waco Family Medicine

Among McLennan County births, 39% receive no prenatal care during the first trimester (exceeds state average)



United Way of Waco-McLennan County and its partners—people like you—have been serving others for **more than 100 years.**

UNITED WAY CONTACT INFO



United Way of
Waco-McLennan County

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