

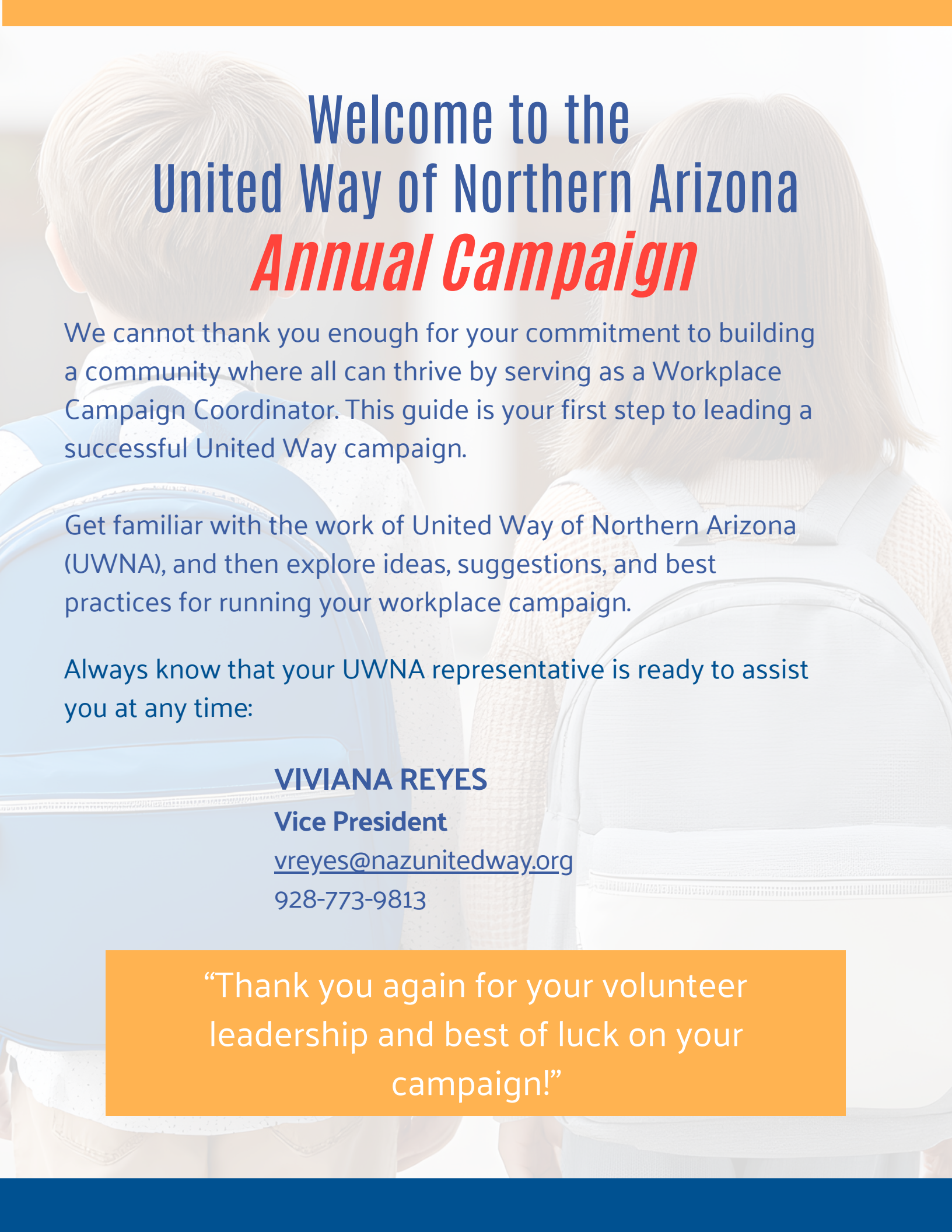


CAMPAIGN COORDINATOR TRAINING GUIDE



UNITED WAY
Northern Arizona

1515 E. Cedar Ave., Ste D-1
Flagstaff, AZ 86004
928.773.9813
nazunitedway.org

A background image showing the backs of two children, a boy on the left and a girl on the right, both wearing backpacks and walking away from the camera. The image is faded and serves as a backdrop for the text.

Welcome to the United Way of Northern Arizona *Annual Campaign*

We cannot thank you enough for your commitment to building a community where all can thrive by serving as a Workplace Campaign Coordinator. This guide is your first step to leading a successful United Way campaign.

Get familiar with the work of United Way of Northern Arizona (UWNA), and then explore ideas, suggestions, and best practices for running your workplace campaign.

Always know that your UWNA representative is ready to assist you at any time:

VIVIANA REYES

Vice President

vreyes@nazunitedway.org

928-773-9813

“Thank you again for your volunteer leadership and best of luck on your campaign!”

ABOUT UNITED WAY OF NORTHERN ARIZONA

Steve Peru
& Beth Otterstein

2026-2027
Campaign Chairs



**United Way of Northern Arizona envisions communities
where all can thrive.**

It brings people and resources together to achieve bold goals and collaboratively tackle our region's toughest challenges.

We mobilize communities in **Coconino, Navajo, and Apache counties** to ensure everyone can thrive by creating more opportunities for our children and teens, promoting healthy communities, and helping families find greater financial security.

And in times of emergency, we help keep our communities resilient by rallying volunteers and directing resources to where they are needed most, quickly and efficiently.

ABOUT UNITED WAY OF NORTHERN ARIZONA

We focus our collective efforts in four vital areas:



Youth Opportunity.

Through our Step Up for Youth initiative, we tackle big challenges, such as expanding access to affordable, high-quality childcare and fostering positive youth development so our teens can reach their full potential.



Healthy Communities.

Helping families meet basic needs like safe housing and adequate food enables them to move from day-to-day existence to planning for a positive future.



Financial Security.

We support education, tools, and job training programs so that families have financial freedom, peace of mind, and can build a stronger future for their children.



Community Resiliency.

In times of emergency from wildfires to pandemics, we marshal resources to help meet the immediate needs of the community.



How do donors know that their money is going where it is most needed?

Groups of dedicated volunteers known as **Community Investment Teams** evaluate all requests for funding. These volunteers range from community volunteers to business leaders to government officials and are charged with carefully monitoring community needs, meeting with local health and human agencies, and reviewing requests for program funding. Their recommendations are ultimately voted on by our volunteer Board of Directors.

UWNA doesn't just raise money, however. We focus on collective impact by collaborating with other stakeholders and service providers in programs, with a particular focus on stepping up for youth.

These include:

- KinderCamp™ - a targeted early intervention school readiness program designed to help children, ages 4-5, with the foundational, social, and academic skills necessary for a successful transition into kindergarten.
- Dolly Parton Imagination Library - a program that provides a free book every month to children from birth to age 5.
- Literacy Fairs - Multiple times a year, we work with a wide variety of partners to provide books to elementary school children to foster a love of reading.
- Youth Leadership Workshops and Conferences - day-long meetings to inspire, equip, and empower high school students with the tools they need to thrive as future leaders in their communities.
- Volunteer Coordination - We work with the City of Flagstaff and Coconino County to organize volunteers and assist in emergency crisis response.

You can learn more about UWNA in our **frequently asked questions** section on page 18.

7 STEPS TO A SUCCESSFUL CAMPAIGN

01. SECURE TOP-LEVEL MANAGEMENT SUPPORT.

Support from top management will make your job easier and your campaign more successful. Review past results and discuss your company's corporate gift, matching, or incentive policy, as well as a campaign budget. Strive for the following commitments:

- Adequate planning time and budget to coordinate campaign-related activities and incentives.
- CEO/Management letter endorsing the campaign.
- Having the CEO/Management speak at employee meetings and events.

02. RECRUIT A TEAM.

Having others assist you with the campaign will make it fun and easy for everyone involved. Here are some tips for recruiting your committee:

- Recruit people who believe in United Way of Northern Arizona (UWNA) and will help get others excited about your campaign.
- Include representation from all areas of your organization.
- Assign roles and responsibilities.

03. PLAN THE CAMPAIGN.

Choose strategies that best fit your business and develop a timeline that helps you achieve your goals. Tips for planning include:

- Review the strength of past campaigns and develop a challenging goal with your CEO/Management that focuses on areas of potential within your organization.
- Consider a participation goal in addition to a dollar goal.
- Plan a short, intensive campaign, no more than 5 to 10 days. Set dates for your kickoff and special events.
- Create a strategy to reach individuals who aren't currently giving. How can you make United Way of Northern Arizona's message relevant to them?
- Use prizes and incentives as a great way to drive donations and/or award employees for participating in campaign events.
- Get employees involved with volunteering through the United Way of Northern Arizona www.nazunitedway.org/get-involved/volunteer.

7 STEPS TO A SUCCESSFUL CAMPAIGN

04. ORGANIZE A LEADERSHIP GIVING CAMPAIGN.

Companies that run a leadership campaign have average gifts that are 24% higher and overall participation that is 30% higher than those that don't. Here are some best practices:

- Appoint someone to spearhead the effort and act as a leadership giving champion.
- Identify your leadership prospects.
- Make a personal 'ask' through a leadership event, letter, or other strategy.
- Follow up with leadership prospects.
- Thank and recognize leadership contributors.

05. PROMOTE YOUR CAMPAIGN.

Educating your employees about the work and value of United Way of Northern Arizona is the best way to gain their support. Your campaign officer is an excellent source for any materials and assistance you may need. Consider the following ideas:

- Utilize UWNA brochures, letters, success stories, etc.
- Arrange for a speaker to attend your company kickoff/meeting to talk about the work United Way of Northern Arizona is doing and share the real difference your contributions are making in our community.
- Plan ways to keep United Way of Northern Arizona visible throughout the campaign, i.e., daily reminders, success stories, and status reports.

06. KICK OFF YOUR CAMPAIGN

A kick-off event can help bring fun into your company campaign and generate enthusiasm around activities within your organization:

- Keep the kickoff meeting short and sweet. Utilize an existing employee meeting time if possible.
- Be sure to include CEO/Management/Labor endorsements.
- Ask all employees to make a pledge to United Way of Northern Arizona.
- Include refreshments – if you feed them, they will come!

CORPORATE CHALLENGE

United Way of Northern Arizona is encouraging all its corporate partners to strive for a **10% increase** in either the number of employees participating, total revenue collected, or corporate gift and/or matching funds.

7 STEPS TO A SUCCESSFUL CAMPAIGN

07. REPORT RESULTS AND SAY THANK YOU!

Work with your campaign officer to ensure that all of the contributions are collected and reported accurately.

Once you've reported your results, it's important to say thank you to all the employees who helped make your campaign a success. Acknowledging those who participated is crucial and ensures their gift in the future.



ONLY HAVE 10 MINUTES FOR A UNITED WAY MEETING? WE CAN DO THAT!



Senior Leadership Welcomes Employees



United Way Presentation by your UWNA Staff Representative



United Way Video



Senior Leadership/Campaign Coordinator talk about why the company supports United Way, and thanks staff for coming



CREATIVE CAMPAIGN IDEAS

AUCTION: LIVE, SILENT, OR ONLINE

Use donations from companies or handmade/donated items by your employees

BABY PICTURE CONTEST

Charge an amount to enter the contest and to make guesses

CHILI COOK-OFF COMPETITION:

Charge an amount to enter the contest and to place a vote

DUNK TANK

Generate excitement and energy among your employees to unite them in a common goal

BAR-B-QUE

Generate camaraderie among employees and unite them in a common goal

POPCORN SALE

Charge per bag of warm deliciousness

RESERVED PARKING SPACE

Top donors/donors who pledge by a certain date are eligible to win the special space

DAY OF VACATION DONATION

By donating unused vacation time, it's an easy way to contribute.

COOKBOOK

Compile employee recipes and sell completed cookbook to generate special event dollars



ROOT BEER FLOATS OR ICE CREAM SOCIALS

Charge per sweet treat to
enjoy the sugar high and
feel-good of donating



OFFICE OLYMPICS

Talk about a good time!
Charge to enter a team
and/or compete in
different events

CREATIVE CAMPAIGN IDEAS



GARAGE SALE

Use donations from
employees to generate
relief from clutter and
special event dollars

GOLF TOURNAMENT

MINI OR MAJOR: Team
building, competition,
and golf. Need we say
more?

FOOTBALL POOLS

Charge an amount
to enter the
contest

MUSIC EVENT OR CONCERT

Charge for tickets and
generate camaraderie
among employees



SPORTS TOURNAMENT

Like Office Olympics, but
this activity focuses on one
specific sport – charge to
enter a team



CREATIVE CAMPAIGN IDEAS

POKER NIGHT

Play your best hand at cards with buy-ins benefiting your campaign

EMPLOYEE SKILL SALES

Sell the skills of your employees (hairstylist, masseuse, lawnmower, etc.)

JEANS DAY

Everyone likes casual day – for a certain donation, employees can dress down on a designated day



PENNY WARS

Raise a lot of money in a short amount of time with competition and team building

MOVIE DAY

Charge employees for movie tickets, snacks and beverages

SCAVENGER HUNT

Use LIVE UNITED themed items and send your employees learning – charge to enter a team





CREATIVE CAMPAIGN IDEAS

TALENT SHOW

Show off all those skills – charge to enter an act.

THEMED BASKETS

Team building and competition between departments – charge to enter or to vote/win baskets

USED BOOK SALE

Use donations from employees to generate relief from clutter and special event dollars.

UGLY SWEATER CONTEST

Charge an amount to enter the contest for the ugliest accessory they can show off

UWNA JEOPARDY

Create a version of this game show for employees to generate energy

PUMPKIN CARVING CONTEST

Charge an amount to enter the contest and to vote for your favorite picture



THE SIX-DAY CAMPAIGN

Here is a sample timeline of **how to run a six day campaign**. Each day you will provide staff with a note and small gift to encourage them to donate on the sixth day of your campaign.

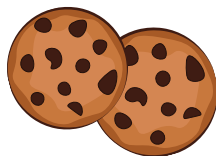
DAY 1: Friday



Gift: A stick of chewing gum

Note: "United Way of Northern Arizona is hoping your will 'chew-z' to give next Friday"

DAY 2: Monday



Gift: Chocolate chip cookies

Note: "Please 'chip' in on Friday and make a difference"

DAY 3: Tuesday



Gift: Can of pop

Note: "Don't forget to 'pop' into our campaign meeting on Friday"

THE SIX-DAY CAMPAIGN

DAY 4: Wednesday



Gift: A piece of chocolate

Note: “Help us to sweeten someone’s future by giving to United Way on Friday”

DAY 5: Thursday



Gift: Fortune Cookie

Note: “We are fortunate to be a part of this community. Your chance to make a difference is coming on Friday”

DAY 6: Friday



Gift: A United Way sticker

Note: “Thank you for saying ‘yes’ to helping others”

Additional Tips

- Distribute a United Way brochure and pledge link
- Explain that the pledge should be completed by Friday
- Explain any incentives, drawings, or special events
- Assure donors they can contact you with any questions

WHAT IS THE SUMMIT SOCIETY?

United Way of Northern Arizona's Summit Society is made up of active community investors who give \$500 or more annually. The strength of the Summit Society lies in each member's belief that the Northern Arizona community is worthy of significant personal investment. The Summit Society has seen steady growth in membership since it was founded in 1992.

SUMMIT SOCIETY GIVING LEVELS



Kendrick Level

\$500 - \$749



Agassiz Level

\$2500 - \$4999



Doyle Level

\$750 - \$999



Humphrey Level

\$5000 - \$9999



Fremont Level

\$1000 - \$2499



Tocqueville Society

\$10,000 +

WHY PROMOTE THE SUMMIT SOCIETY IN YOUR WORKPLACE CAMPAIGN?

- **United Way partners** with dozens of companies and organizations during the Annual Campaign drive. The more engaged your leaders become with United Way - including by being Summit Society Members - the more exposure your employer gains with your partners, clients and prospects.
- **Strong involvement** will enhance your company's alignment with the increased health of our community, increased quality of life for all, and the creation of a strong business sector in the long-term.
- Entry into **the Summit Society** is as little as \$42 a month and can easily be accomplished through payroll deductions!

LAST YEAR, **SUMMIT SOCIETY**

DONATIONS MADE UP **69% OF THE TOTAL CAMPAIGN DOLLARS RAISED.**

ELECTRONIC PLEDGING

Give your employees an efficient, secure way to donate to United Way with **ePledge**.



WHAT IS ePLEDGE?

ePledge is an online giving portal that allows you to collect employee pledges efficiently and securely. United Way builds and manages the portal, saving time and energy for you and your company.

Features include:

- Ability to designate where funds are spent
- Multiple giving methods - payroll deduction, credit/debit card, bill later
- Ability to track department or location
- Customized, real-time reports available as spreadsheets or PDFs



ELECTRONIC PLEDGING

ADVANTAGES FOR THE DONOR

- Secure – link that allows them to sign in and create their own password
- Convenient – see last year's pledge and use a calculator to determine this year's gift
- Confidential
- Simple process: choose pledge method; choose pledge amount; select communication preferences with United Way; submit gift with immediate confirmation

ADVANTAGES FOR THE COMPANY

- Free! There is no charge to your company.
- Efficient
- Your staff is no longer physically distributing and collecting pledge cards.
- Downloadable CSV reports to import into your payroll system.
- Accurate – no manual data entry from pledge cards
- Environmentally friendly - no more paper pledge cards
- Secure – safely store employees' data and reduce the number of people who have access to pledge information
- Java based
- Data secured behind United Way firewall
- Banking information and card numbers are not stored in the United Way database
- Credit and debit card transactions are handled by CyberSource, a third-party processor that is PCI compliant.

IS THIS OPTION RIGHT FOR YOU? NEXT STEPS

- Confirm the basic requirements:
 - The majority of employees have work emails. You can supplement with paper pledge cards that United Way processes.
 - Employees have access to email and the internet.
- Schedule your employee group meetings and kick off your campaign.

FREQUENTLY ASKED QUESTIONS

Q. WHAT IS UNITED WAY OF NORTHERN ARIZONA?

A. United Way of Northern Arizona is a local non-profit organization that brings our community together and focuses resources on the most critical needs in Northern Arizona. By partnering with government, business, the faith community, education, nonprofits, and individuals, we're able to monitor the needs of our community and respond quickly as issues and opportunities arise. As a convener, collaborator, funder, and leader in addressing health and human service issues, United Way of Northern Arizona fulfills a unique role in making our community a better place. And thanks to the generous support of people throughout Northern Arizona, we're helping to improve lives every day.

Q. IS UNITED WAY A NATIONAL OR LOCAL ORGANIZATION?

A. United Way of Northern Arizona is a local, nonprofit organization, governed by a group of dedicated volunteer community members.

Q. WHY SHOULD I GIVE TO UNITED WAY?

A. When you give to United Way, you help provide solutions to the most critical issues in our community. UNITED, we make a greater impact on an educated and thriving community. A community that supports those in need collectively ensures lasting change. Combining investments and effort can move the needle on challenging community issues.

Q. WHY GIVING TO UNITED WAY OF NORTHERN ARIZONA IS THE BEST WAY TO CONTRIBUTE IN OUR COMMUNITY.

A. There are several reasons why contributions to United Way are the best way to help the most people in our community. These reasons include:

- Your United Way contribution is an investment in your community; you are helping provide solutions to the most critical human needs in our community.
- Community volunteers carefully review each United Way partner on an annual basis. Their oversight ensures partners adhere to sound fiscal practices and that your contribution is invested in programs that make an impact in our community.
- When you give through your workplace campaign, your contribution can be spread out over the course of the year through payroll deduction, making it easier for you to be a partner in addressing critical needs in our community.
- Together, we can get results that no one can get alone.

FREQUENTLY ASKED QUESTIONS

Q. WHAT DOES UNITED WAY DO IN ADDITION TO RAISING MONEY?

A. Fundraising is only a small portion of the impact that United Way of Northern Arizona brings to our community. We focus on the collective impact by working together with other stakeholders and service providers in some of the following ways.

- Promoting kindergarten readiness, ensuring student success.
- Nurturing a culture of literacy.
- Advancing a world-class education.
- Increasing personal safety, security, and self-sufficiency.
- Assisting in emergency crisis response.

Q. HOW DO I KNOW THAT MY DONATION WILL HELP THOSE WHO NEED IT MOST?

A. A group of dedicated volunteers that range from community volunteers to business leaders carefully monitor community needs, meet with local health and human agencies, review each partner's request for program funding, and invest your contribution in programs that improve the most lives.

Q. IS MY UNITED WAY CONTRIBUTION TAX DEDUCTIBLE?

A. Yes. Charitable donations are after-tax. This included donations to the Arizona Charitable Tax Credit. Because your charitable donations come out of your after-tax earnings, you can deduct the total amount deducted from your payroll checks during the year on the "Gifts to Charity" line of your Schedule A if you choose to itemize instead of claiming the standard deduction. If your employer matches your payroll donation, you can't deduct any of the matched donation -- only your employer can deduct that portion of the charitable gift.

Q. HOW IS UNITED WAY OF NORTHERN ARIZONA HELD ACCOUNTABLE?

A. United Way of Northern Arizona prides itself on being a trustworthy and accountable organization. A volunteer committee of financial experts meets year-round, monitoring the organization's financial position. We maintain high standards of operation and are reviewed each year by an independent auditor, who verifies that our financial statements fairly present the financial position of United Way of Northern Arizona.

Q. How much of my contribution actually goes back to the community?

A. 89% of all funds raised is returned to the community. Our operating ratios are as follows:

- Management and General 3%
- Fundraising 8%

CAMPAIGN WRAP-UP

This is when you begin to see the results of your work as a Campaign Coordinator.

Wrap-up is also the time to report your success and challenges to your United Way staff, so you can plan accordingly for next year's campaign.

Here are a few steps to guide you through your wrap-up:



Run Final Reports (if applicable)



Run final reports immediately following a meeting or set a deadline



SWEEP UP



Look for all missing pledge forms



Double check that anyone on vacation or leave of absence was "Asked"



Send email or voice mail reminders to those who have forgotten to fill out their donation form



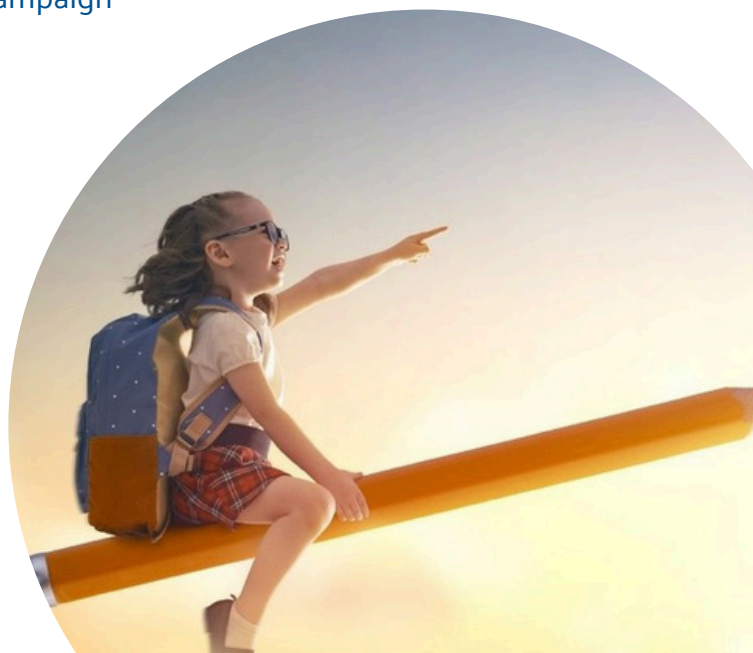
TABULATE RESULTS



Evaluate and measure the success of your campaign



Did you reach your goal for the campaign?



CAMPAIGN WRAP-UP



SAY THANK YOU



You can never say thank you enough!



REPORT YOUR RESULTS



Report your results to United Way, including sharing any final reports



Please provide as much information as possible for all donors so United Way can acknowledge them



COMPLETE UNITED WAY SURVEY



The Campaign Coordinators Survey will be distributed to coordinators following the recognition event



Your participation in this survey will help United Way improve the campaign for the future

