

**The Round Up**

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| Being a UWAC volunteer isn’t hard. You just need the Production Plan to face our community problems (Health, Education, Income and Basic Needs)! ***A UWAC volunteer always fights for the health, education, and financial stability of every person in our community!***Let’s take a closer look at how to make your campaigns successful!**PREPAREDNESS**1. **REVIEW ACCOUNT INFORMATION:** The company summary will show important information including a history of past employees and company giving, who the CEO and ECC are and how to contact them. You should take the time to review each of your accounts and be familiar with last year’s campaign details so your planning meeting with the ECC goes smoothly.
2. **CONTACT THE ECC:** Call the ECC within **two weeks** and introduce yourself. Remember, they are expecting you to call!

*“Hello, this is (****your name)*** *from (****company name)*** *and I’m your Loaned Executive from United Way this year. Will you be the ECC again? I’m so excited to get started! Would it be possible to meet in person in the next two weeks to visit with you about this year’s campaign?”*If they are not the ECC, ask if they know who is and contact them. Update UWAC staff and your Team Leader (TL) of the change. **A personal meeting to discuss the campaign is best.** Schedule a time that works for both of you. If you are meeting in person, find out how to get to their office and where to park. This is a good time to exchange contact information, and their preferred method of communication (text, email, calls) so you can always reach them, and they can reach you.Don’t forget to thank them for being willing to meet with you and follow up with the appropriate communication to confirm the meeting date, time, and location. **If you have any issues contacting the ECC or scheduling a meeting in the first two weeks, talk to your TL!** | 1. **MEET WITH THE ECC:**

**Pro Tip: Meet with your company’s ECC first.** Your planning meeting with the ECC is the foundation for your successful campaign. During the meeting, give the ECC a copy of the most current Community Status Report. Encourage them to also refer to the online version on the UWAC website, <https://www.unitedwayama.org/community-status-report>. Go over our program providers and answer any questions they may have. In the meeting cover the following topics:Update the company’s information, including number of employees.Ask about a corporate gift and/or company match.Go over last year’s results and discuss this year’s goal. Let them know that we are encouraging each person to give $5 more per pay period. Ask how they have done their campaigns in the past.Does the company provide any employee incentives for giving (t-shirt, time off)?Will the company do any special events (cookouts, competitions, jean day, etc.)?It’s best to have employee rallies. A typical rally will last about 15 minutes. Ask the ECC how long they would like your presentation to be.Determine the type (lunch, meeting), number, times and locations of rallies.Will the CEO be present and speak?Does the company use the United Way Pledge form?How many pledge forms will be needed? Will there be pens?Will you be able to show the campaign video? Is the company able to access the video online, or will you need a thumb drive?Will you need a microphone?How will the room be set up?How early are you expected to arrive before the rally? |
| Getting this information will allow you to gather the necessary forms and materials for each rally ahead of time. After your meeting, be sure to keep in constant contact with the ECC using their preferred method of communication. **Once you have met with the ECC, let your TL know.****ROCK THE RALLY**1. **GATHER MATERIALS:** Gather up all materials you need for your rally. You can get supplies from the store at the UWAC office. You may need:
	1. Thumb drive with videos or internet access
	2. Driving directions
	3. Pens
	4. Pledge forms, if needed
	5. Program Provider brochures
	6. 211 cards
	7. UW Swag
	8. Campaign envelope

**Contact the ECC the day before the rally to confirm the time and location**.1. **ARRIVE EARLY:** Arrive early and meet the ECC to set up for the rally. Go over the order in which people will speak, determine who will introduce you and who will explain the pledge form and go over company incentives (if any). If you plan to show the video, test the equipment to make sure it works. Have all materials ready the day before the rally. Always be prepared for last minute changes and be flexible if a change occurs.
2. **GIVE YOUR PRESENTATION:** This is where you shine! Remember your training. Be confident— remember **you** are the expert! To be most effective, keep your presentation to just 5-7 minutes unless you have received other guidance from the ECC.
3. **WRAP UP THE RALLY:** After the rally, be sure to help the ECC cleanup or get ready for the next rally. This is also a great time to discuss how the rally went and when you can pick up the campaign envelope and wrap up the company campaign. Always thank the ECC for helping you and being a part of the campaign. **Once you have completed all the rallies for the company, let your TL know!**
 | **Virtual Campaigns:** If the company will not allow you to conduct an in-person rally, talk with your TL about other options**FOLLOW UP**1. **KEEP IN CONTACT:** Keep in contact with the ECC throughout the company’s campaign. Some companies may run their campaign for a month or more while some companies may have just one rally; therefore, weekly communication is a great way to touch base and offer any assistance needed.
2. **BE AVAILABLE:** Make sure you respond promptly to any requests the ECC may have (additional forms, etc.).
3. **PICK UP THE CAMPAIGN ENVELOPE:** When the campaign envelope is ready, be sure to get it picked up quickly. Check over the envelope and be sure the campaign total matches the amounts collected or pledged. Some companies prefer to deliver the envelope directly to the United Way office so always coordinate with the ECC.
4. **TURN IN THE CAMPAIGN ENVELOPE:** It’s important to get the campaign envelope turned in as soon as possible. Take the envelope to the UWAC office and follow the check-in procedure.
5. **SAY THANKS!** Once you turn in your campaign envelope, take a few minutes to send the ECC a thank you note. GREAT JOB!

LE Co-Chair: Billy (806) 670-4457LE Co-Chair: William (405) 397-8098LE Co-Chair: Amy (806) 676-5362Qr code  Description automatically generated |