



Greater Houston

COMMITTEE POSITION DESCRIPTIONS

CAMPAIGN CHAIR

Role: Bring together the necessary people and resources to plan and implement a successful workplace fundraising campaign.

Key responsibilities:

- Attend United Way training and information sessions.
- Recruit a campaign committee and Ambassadors.
- Communicate with management, labor and employees.
- Play a lead role in developing a campaign plan, including goals, strategies and a timetable.
- Direct implementation of the campaign plan.
- Chair regular committee meetings.
- Monitor and communicate campaign progress.
- Address any problems or issues that arise during the course of the campaign.
- Maintain ongoing communication with United Way.
- Ensure that volunteers, donors and suppliers receive appropriate thanks and recognition.
- Evaluate campaign results and make recommendations for next year.

CAMPAIGN CO-CHAIR

Role: Support the Chair, usually in preparation for taking on the role of Chair the following year.

Key responsibilities:

- Support the Chair in all aspects of their role.
- Gain a comprehensive understanding of the campaign in preparation for taking on the role of Chair.
- Participate as an active member of the campaign committee.

EXECUTIVE SPONSOR

Role: Represent the senior leadership team in your organization and secure necessary time, resources and support for the campaign committee.

Key responsibilities:

- Approve the employee time necessary to plan and implement your campaign
- Rally support from senior & middle management
- Send a personalized message to each employee endorsing your campaign
- Attend and speak at campaign events

LEADERSHIP GIVING LEAD

Role: Coordinate the approach to the retention and acquisition of Leadership donors (gifts of \$1,000+).

Key responsibilities:

- Attend a United Way Leadership campaign planning session.
- Develop a Leadership campaign plan.
- Identify potential Leadership donors.
- Arrange a Leadership presentation.
- Recruit and train Leadership Ambassadors.
- Monitor and report Leadership results.
- Ensure that all Leadership donors receive thanks and recognition.
- Evaluate the Leadership program at the end of the campaign and make recommendations for next year.
- Participate as an active member of the campaign committee.

LEAD AMBASSADOR

Role: Coordinate the recruitment, training and recognition of Ambassadors.

Key responsibilities:

- Attend a United Way Ambassador Training workshop, if appropriate.
- Help determine how many Ambassadors are required for each area.
- Coordinate the recruitment of all Ambassadors.
- Arrange training for all Ambassadors.
- Manage activities related to the planning and execution of the pledge drive.
- Communicate with Ambassadors on an ongoing basis.
- Monitor progress and assist with any problems that Ambassadors encounter.
- Ensure that Ambassadors are following up effectively with outstanding donors.
- Ensure that all Ambassadors receive adequate thanks and recognition.
- Evaluate the canvassing program at the end of the campaign.
- Participate as an active member of the campaign committee.

AMBASSADORS

Role: Serve as an Ambassador for the campaign and affinity groups, providing co-workers with an opportunity to make an informed decision about charitable giving.

Key responsibilities:

- Attend an Ambassador training session.
- Learn about United Way and the importance of their work in the community, why it is important to give back to the community and why your organization is running an employee workplace campaign
- Communicate the timetable, goals, events and incentives to co-workers.
- Ask co-workers to support the workplace campaign, answer questions and thank donors.
- Follow up with anyone who was away from the office or who has not made a decision.
- Monitor and communicate progress to your Ambassador Coordinator and/or Chair.

CAMPAIGN COMMITTEE MEMBERS

Role: Assist the Chair in the planning and implementation of a successful workplace fundraising campaign within their defined role.

Key responsibilities:

- Attend campaign committee meetings and appropriate United Way training sessions.
- Provide input into the overall campaign plan.
- Deliver on commitments according to the timetable established.
- Be an Ambassador for your workplace campaign and for United Way.
- Answer questions.
- Help provide thanks and recognition to donors, volunteer and other supporters.

TREASURER/E-PLEDGE/FINANCE LEAD

Role: Coordinate all financial aspects of the campaign.

Key responsibilities:

- Develop an effective monitoring system for campaign funds (pledge form donations and special event money).
- Be main point of contact for e-pledge setup and facilitation.
- Ensure that campaign security/privacy measures are adhered to.
- Oversee the tracking of campaign results.
- Arrange for the submission of all donations to United Way.
- Evaluate the financial systems at the end of the campaign and make recommendations for next year.
- Participate as an active member of the campaign committee.

COMMUNICATIONS LEAD

Role: Coordinate all campaign related communications.

Key responsibilities:

- Develop an effective communications plan which promotes the campaign and educates employees about United Way.
- Handle ongoing campaign communications including regular progress reports.
- Communicate final campaign results.
- Help deliver effective recognition for donors, volunteers and suppliers.
- Evaluate the communications plan at the end of the campaign.
- Participate as an active member of the campaign committee.

SPECIAL EVENTS COORDINATOR/S

Role: Plan and implement specific campaign events.

Key responsibilities:

- Develop a comprehensive plan for each event including promotion, resources, set-up, contingency plan and success measurements.
- Effectively implement special events and/or manage a sub-committee.
- Evaluate the effectiveness of special events at the end of the campaign.
- Participate as an active member of the campaign committee.

DAY OF CARING COORDINATOR/S

Role: Plan and implement specific Days of Caring.

Key responsibilities:

- Develop a comprehensive plan for each Day of Caring including promotion, resources, set-up, contingency plan and success measurements.
- Effectively implement Day of Caring and/or manage a sub-committee.
- Evaluate the effectiveness of Days of Caring at the end of the campaign.
- Participate as an active member of the campaign committee.

RETIREE AMBASSADOR

Role: Coordinate the approach for retired employees.

Key responsibilities:

- Help develop a retiree campaign plan.
- Help coordinate and sign any correspondence being sent to retired employees.
- Organize systematic follow-up.
- Monitor and report results of the retiree campaign.
- Ensure that retired donors receive adequate thanks and recognition.
- Evaluate the retiree program at the end of the campaign.
- Participate as an active member of the campaign committee.

YOUNG LEADERS/LINC AMBASSADOR

Role: Coordinate the effort to engage younger employees up to 45 years old with the campaign (gifts of \$250+ for LINC up to 30 years old and gifts of \$1,000+ for YL up to 45 years old).

Key responsibilities:

- Help develop a Young Leaders/LINC campaign plan.
- Help coordinate any correspondence being sent to younger employees.
- Help coordinate event(s) for Young Leaders/LINC employees during your campaign.
- Pass on communications about volunteer opportunities and events from United Way.
- Monitor and report results of the Young Leaders/LINC campaign, including evaluation at the end of the campaign.
- Participate as an active member of the campaign committee.

WOMEN'S INITIATIVE AMBASSADOR

Role: Coordinate the effort to engage female employees with the campaign (gifts of \$2,500+).

Key responsibilities:

- Help develop a Women's Initiative (WI) campaign plan.
- Help coordinate any correspondence being sent to female employees.
- Help coordinate event(s) for current or prospective WI employees during your campaign.
- Pass on communications about volunteer opportunities and events from United Way.
- Monitor and report results of the WI campaign, including evaluation at the end of the campaign.
- Participate as an active member of the campaign committee.

ALEXIS DE TOCQUEVILLE AMBASSADOR

Role: Coordinate the effort to engage employees who give or have the ability \$10,000+ to the campaign.

Key responsibilities:

- Help develop an ADT campaign plan.
- Help coordinate any correspondence being sent higher level employees
- Help coordinate event(s) for current or prospective ADT employees during your campaign.
- Pass on communications about volunteer opportunities and events from United Way.
- Monitor and report results of the ADT campaign, including evaluation at the end of the campaign.
- Participate as an active member of the campaign committee.

UNITED WAY STAFF (ACCOUNT/CAMPAIGN MANAGER AND LOANED EXECUTIVES)

Role: Provide information, material and strategic advice on best practices.

Key responsibilities:

- Attend campaign committee meetings, as appropriate.
- Assist with committee orientation, campaign debrief session, Ambassador training, group information sessions, mid-campaign review, etc.
- Help arrange United Way Speakers, Agency Tours, and Day of Caring, events, etc.
- Provide information.
- Collect information on the progress of your campaign to monitor the progress of the overall campaign.
- Assist with the preparation and submission of campaign envelopes.
- Assist with final campaign evaluation.