Building a Successful Cole Society Workplace Campaign

1. **Obtain support from your CEO and/or senior management team.**
   Has your CEO already made a personal Cole Society ($1,000 - $9,999) or Tocqueville Society ($10,000+) donation? If not, work with your United Way staff contact to identify the best person to ask your CEO for a Cole Society or Tocqueville gift.

2. **Recruit a Cole Giving Coordinator to organize your Leadership Campaign.**
   Ask a current Cole member to submit a paragraph or short video about why they support United Way at the Cole Society giving level. Include their testimonial with a photo in your email.

3. **Develop a Cole retention and recruitment plan with a timeline and goals.**
   Cole Society should have a separate kick-off event before kicking-off a specific period of giving. At this event, communicate upcoming events and volunteer opportunities, while announcing the results of a past Cole Society giving. This sets the tone for the rest of the campaign through, encouraging and inspiring others to give. Goals can be set for overall number of Cole Society donors, number of those who increased and total dollar amount.

4. **Identify potential donors and potential giving levels for each of them.**
   Check previous donations records for people who have in the past or are currently contributing at the Cole Society Level. Be sure to include people who are already close to the giving level ($500-$999).

5. **Kick-off the Cole Society Program with an Event.**
   Plan the kick-off event inviting current Cole Society donors as well as prospects. Make sure you invite a United Way staff person to participate in the program and educate on the Child Well-Being Impact Fund through a heat map activity (e.g. You are assigned a zip code based on your birthday month. You then explore this zip code on the Child Well-Being map.) Also check with staff on community leaders who may be available to speak. Utilize the Cole Society Talking Points document.

6. **Begin peer-to-peer communications. Make the “ask”.**
   Select the best person within the company to extend the invitation to become a Cole Society donor. Distribute a solicitation note to each donor or ask at group meeting or rally. The Cole Society giving coordinator should follow-up to ensure that potential donors are contacted as planned.

7. **Report results and say “Thank You.”**
   Send a personalized letter from your company’s CEO and Cole Society coordinator thanking each donor. Also consider planning a special event (such as a reception, lunch or dinner) hosted by your company CEO to thank Cole Society donors for their support after results have been confirmed.

8. **Encourage work and personal email addresses for thank you communications.**
   Provide United Way with the names, home addresses, email addresses and donation amounts of the Cole Society donors, so that United Way can acknowledge their donations, thank them for their generosity and commitment, and include them in exclusive leadership communications.

9. **Encourage Cole Members to Follow us on Facebook, Instagram, LinkedIn, and Twitter.**
TALKING POINTS

• Thank the group and introduce yourself and your role at United Way of Greater Atlanta

• History of the Cole Society – The Cole Society is named in honor of Dr. Johnnetta B. Cole, former United Way Board Chair, community champion and former president of Spelman and Bennett colleges

• Where we are now – nearly 8,000 members contributing approximately $13 million

• Personal story of why you give: what motivated you to begin giving, what keeps you giving, what initiatives or focuses resonate with you?

• Child Well-Being and the four Investment Priorities – show the Child Well-Being heat map, explain what it measures and why it’s important. Also, describe how critical donating to the Child Well-Being Impact Fund and the four priorities is and how the indexes show how improvements will be measured. For more information on the Investment Priorities, visit https://www.unitedwayatlanta.org/investment-priorities/.

• Additional ways to engage and connect within the Cole Society

  **Cole Women United (Cole WU)**  
  *Signature cause:* Women United Advancement Initiative; Events: Women’s Leadership Breakfast, Leading a Life of Purpose, Power Panel and Volunteer projects. Cabinet: female leaders from companies and non-profits. Recruiting process occurs in March.

  **African American Partnership (AAP)**  
  *Signature cause:* Powering the Potential of Young African American Males; Events: Leadership Luncheon, Networking Events, Professional Development Training, and Volunteer Projects. Cabinet: leaders from companies and non-profits. Recruiting process occurs in May.

  **Young Professional Leaders – Premium (YPL – Premier)**  
  *Signature cause:* Kids Home Initiative; Events: Night for a Brighter Tomorrow Gala, Networking Events, Professional Development Training, and Volunteer Projects. Advisory Board: Leaders from companies and non-profits. Recruiting process occurs March - May.

• How you can become a member: contribution of $1,000 to $9,999 annually

• Match information: see Leadership Brochure (found on the United Way website)

• Signature events: Women’s Leadership Breakfast (WLB), African American Partnership (AAP) Leadership Luncheon, Night for a Brighter Tomorrow Gala, Leading a Life of Purpose (LLP), etc.

• Volunteer opportunities: Shoebox Project, Silence the Growl, Day of Action, SaturDAY of Service, HoliDAY of Service, etc.

• ASK! AND Thank!
Get involved and see how your donation is being invested. Below is a list of engagement opportunities available to Cole Society members. There are four types of engagement opportunities. Time commitments varies for each opportunity.

**OUTREACH**
Spend 1-2 hours to see firsthand the work of a United Way of Greater Atlanta program or initiative

**2**
**VOLUNTEER**
Participate in executing United Way of Greater Atlanta programs and initiatives

**3**
**BOARD**
Become a board member of a United Way of Greater Atlanta non-profit partner or sit on a United Way committee or cabinet

For more information, contact cole@unitedwayatlanta.org unitedwayatlanta.org
### ENGAGEMENT OPPORTUNITY DESCRIPTION

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<thead>
<tr>
<th>ENGAGEMENT OPPORTUNITY</th>
<th>DESCRIPTION</th>
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<tr>
<td><strong>Tax Preparation Assistance</strong></td>
<td>Train to be an IRS-certified tax preparer and help those individuals and families with low-to-moderate income with free tax preparation. For more information, contact <a href="mailto:vita@unitedwayatlanta.org">vita@unitedwayatlanta.org</a>.</td>
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<tr>
<td><strong>Shoebox Project</strong></td>
<td>Decorate shoeboxes and/or pack and ship them with personal toiletries for homeless women and children in the Greater Atlanta region. For more information, contact <a href="mailto:shoeboxproject@unitedwayatlanta.org">shoeboxproject@unitedwayatlanta.org</a>.</td>
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<tr>
<td><strong>Silence the Growl</strong></td>
<td>United Way’s program that’s designed to fund meals for children who qualify for free or reduced price meals at their schools. An estimated 350,000 are at risk of losing 1 or more meals during the summer break and weekends. For more information, contact <a href="mailto:silence@unitedwayatlanta.org">silence@unitedwayatlanta.org</a>.</td>
</tr>
<tr>
<td><strong>Advocate with Legislators</strong></td>
<td>Get trained to meet with legislators on issues critical to United Way of Greater Atlanta and our local community. For more information, contact <a href="mailto:amintz@unitedwayatlanta.org">amintz@unitedwayatlanta.org</a>.</td>
</tr>
<tr>
<td><strong>Day of Action</strong></td>
<td>Communities across Greater Atlanta — and around the world — come together to harness the volunteer spirit. Join thousands of people and volunteer to help improve the conditions where children and families live. For more information, contact <a href="mailto:volunteer@unitedwayatlanta.org">volunteer@unitedwayatlanta.org</a>.</td>
</tr>
<tr>
<td><strong>Mission United</strong></td>
<td>Work with United Way of Greater Atlanta Veterans’ coordinator to provide services to this community. For more information, contact <a href="mailto:ddrew@unitedwayatlanta.org">ddrew@unitedwayatlanta.org</a>.</td>
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### Additional Volunteer Opportunities

For more opportunities, visit unitedwayatlanta.org/upcoming-volunteer-opportunities
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| Sit on a United Way of Greater Atlanta committee or cabinet or become a board member of a United Way of Greater Atlanta non-profit partner | **Volunteer Involvement Program (VIP)** United Way’s VIP is a nonprofit governance training program offered in spring, summer and fall. Cole Society Donors can attend a VIP class for free before signing up for the full course.  
**County Advisory Board / Committee** Identify and make investment recommendations at the county level as a member of 1 of 13 county advisory boards/committees. For more information, contact the county directly e.g. dekalb@unitedwayatlanta.org or cobb@unitedwayatlanta.org  
**Cole Women United Cabinet** Help Cole Women United to grow and engage women further. Application process begins in the spring with a monthly time commitment for meetings and subcommittee work. For more information, contact colewomenunited@unitedwayatlanta.org  
**African-American Partnership (AAP) Cabinet** Enrich your life, your communities and your resume as an AAP cabinet member. Participate in strategic discussions on AAP’s signature cause, plan engagement opportunities for members and prospects and help children, families and communities reach their full potential. For more information, contact aap@unitedwayatlanta.org  
**Young Professional Leaders (YPL) Board** Join individuals, ages 40 and under, who dedicate their time to engage the next generation of leaders through networking, volunteer projects, and leadership events. For more information on board commitments, contact ypl@unitedwayatlanta.org |

Go to unitedwayatlanta.org/upcoming-events for all event details. Virtual events will be taking place in 2020-21.

For more information, contact cole@unitedwayatlanta.org  
unitedwayatlanta.org