

Seven Steps to a Successful Workplace Campaign



United Way
of the Eastern Panhandle, Inc.

Getting Started

The United Way of the Eastern Panhandle's Employee Coordinators are the key to a successful workplace campaign. When you serve as an Employee Coordinator for your organization's campaign, you are joining thousands of other committed volunteers in our community.

The Employee Coordinators Role

- Provide leadership and direction for the employee campaign within your organization and motivate others.
- Ensure that all employees are provided with information and solicitation materials and are given an opportunity to contribute.
- Help employees understand that their contribution directly affects members, friends, neighbors, co-workers, and other people right here in the Eastern Panhandle.

Step 1: Plan, Plan, Plan

Evaluate Past Performance

Here is an easy way to analyze last year's campaign performance.

$$\frac{\$ \text{Last year's Employee total}}{\# \text{givers}} = \$ \text{average gift}$$

$$\frac{\# \text{givers}}{\# \text{employees}} = \text{percent participation} \%$$

Talk with the previous year's campaign coordinator to learn:

- In what areas/departments did your campaign work well?
- Where are there areas for improvement?

Set a Campaign Goal

Look at the above results. If leadership giving (\$750+) is 10% or more of your total campaign, determine the average gift less leadership giving when considering your potential. Consider the following:

- If you have had a series of good campaigns with high participation and average gifts, consider setting a reasonable percentage increase over last year's total gift.

- If the average gift is high, but participation is low, target a higher participation rate. A strong educational component about United Way's impact in the community may encourage more employees to contribute.
- If participation is good, but average gifts are low, target a higher average gift. Suggesting a guide for giving (e.g. 1% of salary or one hours wage per month) will increase results.
- Consider conducting a leadership giving program for your company. For employees who are in a position to give very generously, a gift of \$750 or more will give them recognition and membership in the Potomac Society. A gift of \$5,000 or more will be combined with a matching grant from a challenge fund and will be recognized with membership in the United Way of America's Tocqueville Society.

(Hint: refer to the workplace campaign planning tools and tip sheets)

Get CEO and Top Management Support and Involvement

Management can champion the United Way campaign by:

- Showing his/her personal commitment to the campaign through active involvement during meetings, events, direct communication with employees.
- Setting challenging campaign goals for the organization.
- Providing the time and resources needed to hold a fun, educational, non-coercive campaign that asks every employee to invest.
- Conducting a leadership campaign for middle and upper management. Making or increasing a (the) corporate gift.
- Asking employees to invest as they are hired.
- Actively involving your retirees in United Way investing.
- Providing information to employees about ways that they can be involved with United Way of the Eastern Panhandle.
- Distributing and posting United Way information at your workplace.

Step 2: Recruit and Train Your Team

Your campaign team can help spread enthusiasm and information about United Way and company campaigns. The size of your team depends on the number of employees and the number of locations that you have.

Recruit employees who:

- Are leadership givers
- Have conducted an employee campaign in previous years
- Have benefited from, or volunteered for, a United Way Program
- Have served on a funds distribution panel
- Participated in a Day of Caring
- Represent a variety of departments in your company
- Coordinate the company newsletter, public relations, communications or marketing

Schedule a training session for your team. Training will not only help to motivate your team, it will also improve their skills. United Way staff would be happy to conduct a training workshop at your place of business.

Step 3: Use United Way's Campaign Resources

The most important thing you can do to increase campaign results is to educate employees about how investing in the United Way benefits our community. We can provide program speakers for employee meetings and agency tours for your company's employees.

Campaign Materials

United Way can provide brochures, posters and audio-visual materials to assist your campaign.

Communicate Your Goal

Incorporate your company's goal in your campaign's publicity. Your campaign success is directly related to the involvement that you generate from your fellow employees. So start spreading the news!

Consider:

- A letter of endorsement from your CEO
- Solicitation letters to your retirees
- Your organization's Marketing/PR/Communications resources
- Thank you letters

Step 4: Meet and Eat!

The main focus of your campaign will be your group meeting or kick-off. It can be as elaborate as a company picnic for hundreds, or a simple morning meeting with coffee and donuts.

(Hint: Implement some fun incentives to help reach your goal. Some companies encourage friendly competitions between departments. Others give days off with pay to reward certain levels of United Way contributions. Make sure that you HAVE FUN!!!!)

The group meeting for employees is at the heart of an effective employee campaign. It is the primary opportunity to tell the United Way story to your fellow employees. Keep the tone brief and informative. Here is a suggested agenda that takes just 20-25 minutes!

PROGRAM	BY WHOM	TIME
Distribute Personalized Pledge Forms and Brochures	CEO, Campaign Coordinator	5 minutes
Welcome and Overview (Purpose of meeting/what you will present)	Campaign Coordinator	2 minutes
Campaign Endorsement (Why you support United Way, share experiences, etc.)	CEO/Top Management	3 minutes

How United Way makes an Impact In the Community	United Way Staff, Program Staff, United Way film	10 minutes
Collect Pledge Forms (if soliciting by group)	Campaign Coordinator	3 minutes

THANK YOU, THANK YOU, THANK YOU!!!!

Step 5: Make the Ask!

Please ask every employee using either group or individual (face to face) solicitation and encourage payroll deductions gifts. Remember, people give to people, so don't overlook this critical step!

(Hint: The number one reason that people do not give to charitable organizations is because they are not personally asked to do so. Who knows how many of the people you will ask to give this year will make a contribution just because you made the extra effort.)

Group Solicitation

As employees enter the group meeting, distribute personalized pledge cards with a copy of the campaign brochure. Emphasize the importance of the contributor's signature on the pledge card. Encourage the collection of completed pledges at the end of the meeting. Follow up with everyone who did not turn in a pledge card.

Individual Solicitation

Following your employee group meeting, a team member or you should visit fellow employees face-to-face to ask for a gift. Thank everyone, even if they choose not to give.

Retiree Solicitation

Many companies will send retirees a letter of solicitation from a respected retiree along with a pledge form and return envelope. Letters should stress the importance of retirees to your company, as well as to the needs of the community and the success of the United Way Programs and services.

New Hires Solicitation

As new employees are added, this is the perfect opportunity to give them the option to participate in the United Way campaign and get involved in the community.

Please Remember

- Giving is a personal matter and a personal decision; whether a person wishes to give and how much they choose to give are up to the individual.
- The exertion of pressure violates the concept of voluntary giving.
- No action which is coercive is acceptable.

Step 6: Report the Results

Please review the following steps to report employee campaign results and return pledges to the United Way office for reporting purposes. It is very important to report your results to United Way as soon as possible.

- Make sure all pledge cards are accounted for, returned, copied and signed. Turn in a copy of all pledge forms to your payroll office.
- Summarize all campaign information on the campaign reporting envelope. Enclose cash, checks, and pledge forms.
- Call your United Way representative to pick up your Campaign Reporting envelope.

(Hint: keep a notebook or file of what worked well for you and any plans or ideas for next year. You or your successor will be glad you did!)

Step 7: Say Thanks

The thank you is one of the most important parts of the campaign. Be sure to recognize and thank each volunteer and donor for their contribution to the campaign. Here are some ideas to consider in concluding your campaign:

- Announce and display company and community campaign results
- Send a personal thank you letter to each contributor
- Write articles for the employee newsletter throughout and at the conclusion of the campaign
- Awards presentation at board meeting, staff meeting, etc.
- Distribute thank you awards, mugs, pens, buttons, etc. (you can order items to be shipped directly to you at www.unitedwaystore.com)
- Sponsor a "Thank You" breakfast, luncheon, or reception

Workplace Campaign Planning Tool #1

Strategies to Increase Participation

C = Continue Doing; I = Improve; A = Add this year

Visible Organizational Leadership Support

- 1) Send a personal letter to each employee urging participation _____
- 2) Establish a matching program with special incentives for new givers _____

Understandable & Measurable Goals

- 3) Set a goal for 100% contact of each employee _____
- 4) Set a goal to get 100% of the pledge cards returned _____

Volunteer Campaign Team

- 5) Recruit members who generously give _____

Written Campaign Plan

- 6) Share your plan with top management and your key leaders _____
- 7) Develop a budget to support the delivery of your plan _____

Campaign Meetings & Activities

- 8) Host agency tours for employee groups _____
- 9) Participate in Special Events for awareness _____
- 10) Develop a theme and do fun activities around the theme _____
- 11) Hold employee meetings featuring speakers and video presentations _____
- 12) Offer incentives for giving and returning pledge cards _____

Leadership Giving Program

- 13) Hold special meetings for Leadership Giving prospects _____

Effective Pledge Cards

- 14) Personalize each pledge card to each employee _____

Pledge Processing

- 15) Develop a pledge processing system to help you manage your campaign, report results and recognize contributors. _____

Campaign Communication & Education

- 16) Communicate year-round _____
- 17) Offer the opportunity to give to new employees at time of hire _____
- 18) Obtain and communicate Labor's endorsement _____

Campaign Recognition

- 19) Recognize and thank new donors and campaign team members _____

Workplace Campaign Planning Tool #2

Strategies to Increase Average Gift

C = Continue Doing; I = Improve; A = Add this year

Visible Organizational Leadership Support

- 1) Personal solicitation of top management for Leadership gifts _____
- 2) Establish and challenge a matching program for Leadership Givers _____

Understandable & Measurable Goals

- 3) Set goals for increasing average gifts _____
- 4) Set goals for Payroll Deduction participation _____
- 5) Set goals for suggested giving guide level giving _____

Volunteer Campaign Team

- 6) Recruit Leadership Givers _____
- 7) Build continuity through leadership succession _____
- 8) Include United Way staff and Loaned Executives in your meetings _____
- 9) Train members and team leaders on effective campaign techniques _____

Written Campaign Plan

- 10) Engage others in developing your plan _____
- 11) Critique last years Campaign _____
- 12) Focus on areas of maximum opportunity _____
- 13) Build a budget to support your plan _____
- 14) Gain top management commitment to your plan _____

Campaign Meetings & Activities

- 15) Use special events to promote the campaign _____
- 16) Take employees on a tour, videotape and use to promote _____
- 17) Hold employee meetings followed w/personal solicitation _____

Leadership Giving Program

- 18) Identify a Leadership Giving chair _____
- 19) Conduct a separate Leadership Giving meeting and ask _____
- 20) Promote gifts of stock _____

Effective Pledge Forms

- 21) Utilize personalized pledge cards for various groups _____

Pledge Processing

- 22) Develop a pledge processing tracking system to help manage your campaign, report results and recognize contributors. _____

Campaign Communication & Education

- 23) Communicate year-round based on employee interests _____
- 24) Promote "One to One, Peer to Peer" Solicitation _____
- 25) Report progress during the campaign _____
- 26) Use personal, video taped and print employee testimonials _____