

United Way of Steele County

Workplace Campaign Coordinator Guide

Confirm CEO Support

Participation of top management is essential to a successful campaign. Ask them to:

- Visibly support the campaign.
- Speak in support of the campaign at company meetings and send personal endorsement and follow-up letters to employees.
- Send a personal letter to every employee, asking for his or her support of United Way.
- Approve incentives to be used for the campaign

Recruit a Campaign Team

Recruit a team to help you plan and organize the campaign. Include members from all levels of the organization. Team size may vary depending on the size of your company. Teams could include:

- Next year's Employee Campaign Chair [ECC]
- Last year's ECC
- Representative from management
- Representative from production
- Representative from personnel
- Representative from accounting
- Representative from PR/Communications
- Supporters from every department at every level of your organization

Running a United Way campaign is a lot easier and more fun with a team of enthusiastic helpers.

Review Your Organization's Past Performance and Goal

One of the keys to planning a successful United Way campaign is to evaluate past campaigns. Former ECCs are a great resource for such information. Set up a meeting with them to answer these questions:

- What was the total employee contribution during the last campaign?
- How many employees contributed?
- What is the current total number of employees?
- What was the level of CEO or top management involvement in the campaign?
- Was there a major special event?
- How was the campaign publicized and promoted?
- What were the best parts of last year's campaign?
- What parts of the campaign need improvement?

Goal Setting

Goal setting should be a joint decision of the campaign team and the CEO. Setting a challenging goal can spur growth in your campaign.

To devise a plan to move toward your organization's potential, consider the following questions:

What if:

- The number of new givers increase to ___?
- A payroll deduction plan was implemented or the number of payroll deductions increased to ___?
- The amount given by existing contributors increased by ___percent?
- The number of Leadership Givers increased to ___?

Once you've set your goal, publicize it to all of your employees. A campaign goal gives your employees something to shoot for and is a great way to energize your campaign.

Determine How to Inform and Ask

Workplace campaigners are critical members of a successful United Way team. They should be knowledgeable about everything from campaign goals to available United Way literature and support materials.

Information and solicitation can occur in two ways:

#1 Group Rallies

Employees come together to hear a presentation and each is asked to make a pledge. Here are some suggestions to make group meetings run smoothly:

- Use a really team to organize the rally.
- Publicize rallies well in advance
- Distribute personalized pledge cares at the rally.
- Include a Speaker's Bureau presentation about United Way.
- Show United Way video.
- Have food. Have fun!
- Have a campaign team member follow-up with those who did not attend the rally.

#2 One-on-One

- Individual employees are contacted by fellow employee. The following suggestions may aid in one-on-one solicitation:
- Recruit one campaigner for every ten employees.
- Choose campaigners carefully-the best givers often make the best askers. Train solicitors to campaign wisely.

Remember, peer-to peer solicitation work best!

Develop a Campaign Timeline

A timeline can help keep you and your campaign on track. The following are important tasks that need to be assigned. Accountability is a must!

Task	Person Responsible	Date Completed
Recruit Campaign Committee	_____	_____
Review Past Performance and set 2017 Goal	_____	_____
Plan Campaign Activities	_____	_____
Plan Publicity	_____	_____
Conduct Leadership Giving Campaign	_____	_____
Coordinate Company Kick-off	_____	_____
Coordinate Group Rallies	_____	_____
Follow up with employees who missed rallies	_____	_____
Personally call on co-workers who have not turned in a pledge card within 48 hours	_____	_____
Bring Campaign Envelopes to US Bank	_____	_____
Host a Victory Celebration	_____	_____
Conduct a company-wide “thank you”	_____	_____
Evaluate campaign and provide a written summary for the next ECC	_____	_____

Publicize Your Campaign

Before you go any further, you should start to build excitement about your campaign. Let everyone know you’re all working toward a common goal. Here are some of the best methods for promoting your campaign:

- Articles in your newsletter about campaign and upcoming events.
- Thermometers displayed in highly visible areas, showing your campaign goal and your daily or weekly progress.
- Display United Way posters in high traffic areas.
- Leave United Way Annual Reports in employee lounges, break room and cafeteria
- Messages about your campaign through your interoffice email system.
- Printed campaign messages on payroll statements and stuffers.
- Flyers distributed in paychecks to announce campaign meetings and events.
- Send out a schedule or calendar to all employees about campaign events.

Promote Leadership Giving

Leadership Giving is the most effective way to increase contributions in your workplace. A Leadership Giving program is easy to implement in a company of any size and can be an excellent source of new dollars for your campaign. Remind your co-workers to check off the Leadership Circle box on their Pledge Card. Leadership categories are:

\$5,000 - \$9,999	Founder's Circle	\$750 - \$999	Sponsor's Circle
\$3,000 - \$4,999	Patron's Circle	\$500 - \$749	Partner's Circle
\$1,000 - \$2,999	Investor's Circle	\$250 - \$499	Associate's Circle
Additional levels:			
\$10,000 +	Tocqueville Society	\$1000 +	Women's Leadership Council

Run an Informative Campaign

United Way Speaker's Bureau

The United Way Executive Director or a Board member can speak to your group. You can have a speaker from any United Way partner agency or a member of the 2017 Corporate Campaign Leadership Team from Federated Insurance come to your campaign kick-off or any department meetings where you'd like additional information about the work of United Way of Steele County.

To book a speaker, email Neil at uwadmin@unitedwaysteelecounty.org or call him at 455-1180.

Sample Rally Agendas

30-Minute Rally (The most effective rally!)

CEO welcomes employees and endorses campaign	3 minutes
CEO introduces ECC	1 minute
ECC introduces Campaign Committee	1 minute
Employee testimonial	3 minutes
United Way Speaker	13 minutes
United Way Executive Director	6 minutes
ECC gives closing remarks and "asks" for the pledge	3 minutes
Please Give!	

20-Minute Rally

CEO welcomes employees and endorses campaign	2 minutes
United Way Speaker	10 minutes
United Way Executive Director	6 minutes
ECC gives closing remarks and “asks” for the pledge	2 minutes
Please Give!	

15-Minute Rally

ECC welcomes employees	1 minute
CEO endorses United Way Campaign	1 minute
United Way Speaker	10 minutes
ECC gives closing remarks and “asks” for the pledge.	3 minutes
Please Give!	

Have Fun!

The United Way campaign is a celebration –a celebration of caring. True celebrations are fun and uplifting. They get people excited about being involved.

Contests	Parties	Incentives
<ul style="list-style-type: none"> • Children’s drawing contest • Campaign slogan/theme contest • Outdoor carnivals • Office Olympics • United Way Games 	<ul style="list-style-type: none"> • Ice Cream social/sundae bar • Pancake breakfast • Pizza party • Potlucks • Company picnic • Beach party 	<ul style="list-style-type: none"> • Reserved parking space • Day off • Gift Certificates • Dinner for two • Concert or Play tickets • Sport tickets

Follow-up

- Collect ALL pledge cards, even from those who choose not to give.
- Thank everyone who attends, even if they don’t give.
- Follow-up with those who missed the rally.
- Answer any questions, or offer to get answers from United Way staff if needed.

Pledge Processing and Reporting

- **Pledge Collection:** Have employees turn in their pledge form to your central collection point. It is important to collect all employee forms, regardless of participation, so that participation may be accurately calculated for both your division and the company.
- **Check for Accuracy:** Please double-check to see that employees have completed their forms correctly and completely. Be sure they have included the **total pledge amount** (no rounding!) and **signed the pledge form**. **ALL pledge forms must be signed.**
- Return original **white copy** of pledge form to United Way. The donor retains the **yellow copy** as a receipt. No other receipt will be issued.
- **Campaign Report Envelope:** Before submitting your pledge forms, please total each pledge type and complete the information printed on the back of the Campaign Report Envelope. The information reported on the outside of your report envelope is very important for our auditing purposes. Please complete it accurately and in its entirety.
 1. Be sure your company identification label is on the campaign envelope. If not, write the name of your company on the envelope.
 2. Fill in the number of employee pledge cards enclosed in the envelope.
 3. Record the amount of cash and checks enclosed
 4. Record the amount payroll deduction pledges
 5. Record the amount of pledges to be billed
 6. Record the amount of credit card pledges
 7. Record the amount of corporate pledges
 8. Total dollar amount equals cash, checks, payroll deduction pledges, pledges to be billed, credit card pledges and corporate pledges
 9. **Drop off envelopes at US Bank - Owatonna, 132 West Broadway.**
- **Payroll Deduction Reports:** Once pledge forms are processed, the United Way office can provide you with payroll deduction information if requested. Original pledge forms will not be returned.

Say “Thank You!”

The most important step in the United Way Campaign is thanking those who gave. By making the givers aware of the importance of their contributions, you not only show appreciation, but encourage future giving as well. Here are some thank-you ideas:

- Report final campaign results to employees.
- Post thank-you message boldly in highly visible areas.
- Have CEO send thank-you letter to campaign team and employee givers.
- Host a campaign-ending event with free refreshments, entertainment, and any awards.
- Recognize significant achievements by individuals, groups or departments.
- Send an electronic thank you card or email thank you.
- Produce a special “Thank You” edition of your company newsletter.

Host a Victory Celebration

A fun way to say “thank you!” is to host a Victory Celebration. It could be a special breakfast, a luncheon or even a barbeque in the parking lot to celebrate the success of your campaign!

A representative of United Way would be happy to attend your celebration to personally thank your CEO and co-workers for holding an annual United Way Campaign.

United Way also wants to share your success by taking photos of employees, the campaign team and your CEO to send to the Owatonna People’s Press along with a press release to celebrate our partnership and your generosity with the whole community!

Campaign Assistance

Contact us for help on your campaign.

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Kim Schaufenbuel, Executive Director, kschaufenbuel@unitedwaysteelecounty.org

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