



2011/12 Employee Campaign Coordinators' Guide

# CAMPAIGN

Find Workplace Campaign Materials online at [www.unitedwaymerced.org](http://www.unitedwaymerced.org)

# Best Practices

## Tools & Checklists

DESIGNED TO MAKE YOUR 2010/11  
WORKPLACE CAMPAIGN A SUCCESS.

**LIVE UNITED**  The United Way logo consists of a blue square containing the words "United" and "Way" in white, stacked vertically. To the right of the square is a circular icon with a yellow sunburst at the top, a red figure with arms raised in the center, and a blue wave at the bottom.

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# CAMPAIGN AT-A-GLANCE

## **SIX WEEKS BEFORE** YOUR CAMPAIGN KICKOFF

- Meet with your United Way representative and begin planning your campaign.
- Attend United Way's Employee Campaign Coordinator Orientation.
- Secure CEO or senior management support.
- Set dollar, participation and education/awareness goals.

## **FOUR WEEKS BEFORE** YOUR CAMPAIGN KICKOFF

- Recruit and train your campaign team.

## **TWO WEEKS BEFORE** YOUR CAMPAIGN KICKOFF

- Conduct a pacesetter campaign. A Leadership Giving campaign is a great way to launch.
- Begin promoting your campaign kickoff and activities.

**DON'T  
JUST  
WEAR  
THE SHIRT.  
LIVE UNITED**



## KICKOFF CELEBRATION

- Invite guest speakers from United Way, your CEO and senior management.
- Share pacesetter campaign results.
- Establish a campaign theme and hold fun activities ([WWW.UNITEDWAYMERCED.ORG](http://WWW.UNITEDWAYMERCED.ORG) CAMPAIGN MATERIALS)

## DURING YOUR WORKPLACE CAMPAIGN

- Hand out contribution forms or email information about online giving.
- Send follow-up emails every few days to keep up the enthusiasm. Include community facts and success stories.
- Hold special fund-raising events and meetings (e.g., bake sale, raffle, mini golf tournament).
- A list of campaign themes and fun activities is available at ([WWW.UNITEDWAYMERCED.ORG](http://WWW.UNITEDWAYMERCED.ORG) CAMPAIGN MATERIALS)
- Give employees opportunities to learn more through United Way speakers or volunteer activities.

## THREE DAYS BEFORE YOUR CAMPAIGN CONCLUDES

- Send a reminder email that your campaign is concluding and contribution forms need to be submitted.

## WRAP-UP AFTER YOUR CAMPAIGN

- Collect contribution forms.
- Submit contribution forms and final reports/data to your payroll department and to United Way using our report envelope process.
- Announce campaign results to your employees.
- Thank employees with a celebration event, letter, email, etc.
- Thank your campaign team, leadership contributors and other special groups.
- Gather feedback and notes for next year.
- Choose an Employee Campaign Coordinator and set a kickoff date for next year. Provide this information to your United Way representative.

# 10 CAMPAIGN BEST PRACTICES

1. **Involve your CEO**
2. **Build a strong, diverse campaign team**
3. **Set clear goal. Track and report results.**
4. **Utilize United Ways experienced staff and campaign resources.**
5. **Establish a Leadership giving Program (gifts of \$1,000 +)**
6. **Hold a Tocqueville Society event (gifts of \$10,000 +)**
7. **Conduct a strong educational campaign**
8. **Organize volunteer ac**
9. **Make the ask. Collect Contribution forms/e-pledges**
10. **Say thank you and help United Way say thanks, too**

## GOOD PLANNING USUALLY STARTS WITH GOOD QUESTIONS

*Your answers will give you a strong base to work from as you plan your campaign.*

- What community issues are most important to your company?
- Who in your company's management is supporting you?
- Is your company structured by departments, work groups, geography, other? Consider structuring your campaign team along similar lines.
- Can you incorporate United Way into already established company events and communications?
- How can you make sure every donor is educated and asked to contribute?
- What would be the best incentive to get employees to participate in the campaign? Day off? Special events? Prizes? Corporate match of their gift?
- What techniques can you use to engage Leadership contributors?
- How do you say thank you to all your donors? Do you provide United Way with your contributors' names and contact information so we can say thank you, as well?

# CAMPAIGN BEST PRACTICES 1-3

## 1

### INVOLVE YOUR CEO OR SENIOR MANAGER

- Ask this person to provide consistent and visible management support for the campaign. He or she should be a speaker at major campaign events, including the kickoff celebration, Leadership Giving events and your campaign closing thank-you event.
- A "welcome to our campaign" letter or email from your CEO can help set the tone for the campaign. Thank-you letters, memos and emails to all contributors are appreciated by employees. Sample letters are available at [www.unitedwaymerced.org](http://www.unitedwaymerced.org).

## 2

### BUILD A STRONG, DIVERSE CAMPAIGN TEAM

- You can't do it alone! Build a campaign team with representatives from throughout your organization (by department, location or other structure).
- The more hands, the better! We suggest one campaign team member for every 10 to 15 employees. Consider including labor, management, payroll, all locations and shifts, retirees, etc.
- Train your team! The role of the campaign team is twofold: to answer co-workers' questions about the campaign and to be the key contact for educating employees and getting Contribution Forms completed. We're here to help. Your United Way representative can assist with training.

## 3

### SET CLEAR GOALS, TRACK AND REPORT RESULTS

*The best campaigns have measurable goals. Look at last year's results, then set new goals based on where you can make the greatest improvement, such as:*

- Increase participation (the number of employees giving)
  - Increase average gift (how much each employee gives)
  - Increase the number of Leadership contributors (gifts of \$1,000 or more)
  - 100% education: How are you going to ensure everyone learns about important community needs and how United Way is partnering with your organization to make Merced County a better community for all of us?
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- 100% ask: How will you ensure that everyone has the opportunity to participate in the campaign? Keep in mind that giving is a personal decision and no form of coercion is acceptable at United Way.

## CAMPAIGN BEST PRACTICES 4-6

### 4

### UTILIZE UNITED WAY'S EXPERIENCED STAFF AND CAMPAIGN RESOURCES

*Our team is ready to assist you from start to finish.*

- Our Employee Campaign Coordinator orientation will get you up and running.
- Your United Way representative can help plan and customize your campaign to take advantage of proven best practices.
- Tap into our expertise about local community issues and create a strong case for giving
- Take advantage of customized corporate giving options that match your organization's philanthropic objectives.
- Work with United Way to continue your company's community involvement throughout the year.

### 5

### ESTABLISH A LEADERSHIP GIVING PROGRAM (GIFTS OF \$1,000+)

*Leadership Giving is a great way to grow your campaign and works well as a pacesetter campaign. Tips for a winning Leadership Giving campaign:*

- Enlist the help of senior management or a Leadership Giving committee.
- Invite current and potential Leadership contributors to participate. It's about \$20 a week to give at the leadership level.
- Set a separate goal for Leadership Giving.
- Hold smaller, more targeted events to educate prospective Leadership contributors about important community needs as well as the unique benefits of Leadership Giving.
- Remember to say Thank You.

## 6

## CREATE A TOCQUEVILLE SOCIETY PROGRAM (GIFTS OF \$10,000+)

The Tocqueville Society is a national association created to honor individuals who serve our community through their extraordinary generosity. Benefits of joining the Tocqueville Society include: recognition in United Way publications, invitations to members-only Society events and relationship managers dedicated to providing personalized service. Your United Way representative can assist you in planning a Tocqueville giving program at your organization.

## CAMPAIGN BEST PRACTICES 7&8

## 7

### CONDUCT A STRONG EDUCATIONAL CAMPAIGN

We're focused on connecting people who care with results that matter. Our team will partner with you to ensure your corporate and employee giving makes an impact in our community.

- Contributors who hear, understand or experience first-hand important issues facing our community are more eager to get involved and give.
- Use United Way campaign materials and resources, which include local community statistics and success stories.
- Begin communication at least one week before making "the ask" or handing out contribution forms.
- Conduct fun, educational rallies and events that get people fired up. Games, prizes and success stories spark the kind of caring that leads to the most generous giving.
- Consider including a speaker from United Way or one of our partner organizations at your events. Speakers can tie the message of community with real-life examples.
- Consider creative ways to communicate — voicemails, bulletin boards, paycheck stuffers, electronic bulletin boards. Focus on ways people in your organization prefer to receive information.

## 8

### ORGANIZE VOLUNTEER ACTIVITIES

Volunteer activities help people feel part of a larger community and part of the solution to community issues. This can be a way to engage your employees and forge a long-term relationship and to kickoff your campaign.

United Way's Day of Action offers an easy way for your company to get involved. Each Spring, we match volunteers with projects benefiting local nonprofits. For more information, talk with your United Way representative.

## CAMPAIGN BEST PRACTICES 9&10

### 9

#### MAKE THE ASK. COLLECT CONTRIBUTION FORMS AND e-PLEDGES.

Believe it or not, the No. 1 reason people don't give is that no one ever asked them to do so. Make sure everyone has an opportunity to participate. Keep in mind that giving is a personal decision and no form of coercion is acceptable to United Way.

Here are some hints about HOW to ask others to give and WHAT the best methods of giving are.

- Personally distribute contribution forms and campaign materials. Engage your campaign team to help you.
- Ask everyone to turn in a signed pledge form even if they choose not to give. This way, you will know that every person had an opportunity to give. Many companies distribute pledge forms in envelopes that the employees can fill out and seal, assuring them that no one will know if they gave or how much they gave.
- Remind everyone in person that their support is important, and ask if they will consider making a gift.
- If you would like to capture pledges online, please contact your United Way representative.

### 10

#### SAY THANK YOU AND HELP UNITED WAY SAY THANKS TOO

There are many ways to thank people:

- Schedule a thank-you celebration.
- Send an email or letter from you and your CEO to every employee.
- Give out thank-you pins, cards, certificates or other recognition items.
- Include a thank-you message in your company newsletter and/or intranet.
- Encourage your employees to visit our website ([www.unitedwaymerced.org](http://www.unitedwaymerced.org)) to find out how their contributions are achieving results in our community.

# STEP-BY-STEP CHECKLIST

## PLAN YOUR CAMPAIGN

Target Date

<input type="checkbox"/> Meet with your United Way representative.	/ /
<input type="checkbox"/> Attend the Employee Campaign Coordinator Orientation.	/ /
<input type="checkbox"/> Secure CEO/Senior Management endorsement.	/ /
<input type="checkbox"/> Recruit a campaign team comprised of representatives from all departments.	/ /
<input type="checkbox"/> Recruit a Leadership Giving chairperson.	/ /
<input type="checkbox"/> Review campaign history and set dollar, participation and awareness goals.	/ /
<input type="checkbox"/> Confirm campaign budget.	/ /
<input type="checkbox"/> Determine campaign theme, incentives and promotion plan.	/ /
<input type="checkbox"/> Confirm dates and key details for your campaign kickoff and other important events (e.g., time, location, speakers, food, activities).	/ /
<input type="checkbox"/> Plan your organization's participation in Day of Action.	/ /
<input type="checkbox"/> Schedule community speakers and tours.	/ /
<input type="checkbox"/> Share campaign details, including goals and strategies, with CEO and management.	/ /
<input type="checkbox"/> Conduct campaign team training in partnership with your United Way representative.	/ /
<input type="checkbox"/> Identify past and prospective Leadership Giving contributors.	/ /
<input type="checkbox"/> Plan details of your Leadership Giving and Pacesetter campaign.	/ /
<input type="checkbox"/> Finalize campaign communication strategy. Request customized contribution forms and order materials from your United Way representative.	/ /

# STEP-BY-STEP CHECKLIST

**RUN** YOURCAMPAIGN

Target Date

- Start Leadership Giving or Pacesetter campaign. / /

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- Begin promoting campaign at least one week before your kick-off. / /

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- Campaign Kickoff Celebration**

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- Hand out contribution forms or provide information about online giving.
- Get help from your campaign team! / /

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- Schedule a mid-campaign team meeting to review your results to date and finalize all remaining details. / /

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- Send follow-up emails to remind employees about community needs and upcoming campaign activities. / /

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- Conduct rallies, group meetings and/or special events. Remember to include community speakers, activities, games and/or prizes. / /
- Send a reminder about campaign close. / /

**Demand for grants and services from United Way of Merced County has never been greater reflecting how local residents have been impacted by the global economic crisis. Please help address this increasing need by supporting United Way.**

# STEP-BY-STEP CHECKLIST

## CLOSE YOUR CAMPAIGN

Target Date

<input type="checkbox"/> Collect all contribution forms and submit report envelope(s) using United Way's process. Provide United Way the names of your Leadership contributors so they can be recognized in United Way materials.	/ /
<input type="checkbox"/> Submit contribution forms/data to your human resources team.	/ /
<input type="checkbox"/> Remember to make your corporate gift.	
<input type="checkbox"/> Our experienced team can help you identify customized giving opportunities that match your organization's	
<input type="checkbox"/> Talk to your United Way representative.	/ /
<input type="checkbox"/> Hold a celebration event to thank all employees and announce campaign results. Remember to take photos!	/ /
<input type="checkbox"/> Thank contributors, Leadership contributors, your campaign team, senior management, and any other key supporters and volunteers.	/ /
<input type="checkbox"/> Include campaign results and photos in your newsletter, your website and/or intranet.	/ /
<input type="checkbox"/> Meet with your campaign team to collect feedback for next year.	/ /
<input type="checkbox"/> Select next year's Employee Campaign Coordinator and kickoff date.	
<input type="checkbox"/> Provide the information to United Way.	/ /
<input type="checkbox"/> Provide feedback to your United Way representative. Let us know how we can better serve you and our community.	/ /

## ONGOING

Stay informed about how your support is achieving measurable results in the Merced by subscribing to our quarterly newsletter.

Work with United Way to plan year-round community education and volunteer activities.

THANK YOU FOR LIVING UNITED

GIVE. ADVOCATE. VOLUNTEER.

**LIVE UNITED**™ 

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