



Workplace Campaign Planning Guide

A Resource for Employee Campaign Coordinators

AS THE EMPLOYEE CAMPAIGN COORDINATOR, YOU ARE ONE OF THE MOST IMPORTANT PEOPLE in this year's United Way campaign, so we want to thank you for doing more and welcome you to an exciting year of making a real difference in your company — and in our entire community.

As an Employee Campaign Coordinator, you are United Way's "go-to" representative in terms of educating, motivating and inspiring your peers.

United Way touches one of every two lives in our community. United Way is the single force able to pull the community together to confront challenging situations and craft creative solutions to complex problems. Unlike a single-purpose organization that targets one specific problem, United Way supports our entire community from a broad vantage point.

Inland Empire United Way engages a caring community to respond to human need by helping disadvantaged kids succeed in school, providing easy access to community services, developing volunteer opportunities to create positive change, and strengthening financial stability opportunities for low-income families and individuals.

What You Do Matters.

SIX STEPS TO SUCCESS

While each United Way campaign is unique, the Six Steps to Success are the building blocks for an effective campaign and should be followed as closely as possible. Your United Way representative can help you develop a campaign plan that works best for your organization.

1. Establish Support from the Top

As a Campaign Coordinator, your most important first step is to work with your CEO to establish a top-level team. Support from the top demonstrates to employees your company's firm commitment to the campaign and to changing lives in the community.

Your top-level team should include the following roles:

CEO

- Authorize your campaign plan
- Designate time for employee meetings
- Endorse the campaign with a "welcome to our campaign" letter or e-mail
- Be a speaker at campaign kick-off meetings and events
- Personally pledge a leadership gift

Campaign Chair (Someone who reports directly to the CEO)

- Visibly participates in the campaign
- Speaks at campaign events
- Meets with the company's United Way committee to help plan the campaign
- Serve as liaisons between the company's United Way committee and company leadership
- Sends campaign and thank-you correspondence to employees
- Makes a personal contribution

Enlist a Strong Campaign Committee

Involve other enthusiastic employees from your workplace to plan a fun, effective campaign.

- Review the prior year's campaign and share new ideas.
- Train your team to answer co-workers' questions about the campaign and to be the key contact for educating employees and getting contribution forms completed. Your United Way representative can assist with this training.
- Attend a tour of the United Way facility if possible.

2. Set Goals and Track Results

Set a goal for your company (perhaps for your business unit or department as well). Track and report results throughout the campaign to build excitement among employees.

Your United Way representative can help you set your goal. Consider these factors:

- Your company's past results
- Current company environment
- Needs of our community

Tracking results throughout your campaign makes final reporting to United Way easy. It's also a great way to generate excitement to your campaign as employees' watch you get closer and closer to your goal.

Looking at last year's totals, set one or more goals based on where you think you can make the greatest improvement.

- Increase participation (the number of employees giving).
- Increase average gift (how much each person gives).
- Increase the number of Leadership contributions (gifts over \$1000.00).
- Track and report results.

Your United Way representative will provide you with reporting materials to report the following results:

- Total # of company employees
- Number and dollar amount of pledges by payroll deduction
- Number and dollar amount of gifts by cash and check
- Corporate gift amount
- Special Event Fundraising
- Detailed information on leadership level gifts

Please report your results to United Way as soon as possible after completing your campaign. It is important for many reasons:

- Permits timely deposits of checks and processing of credit card pledges
- Ensures accurate records for our annual audit
- Allows appropriate acknowledgment of leadership level

2. Educate Your Employees

It is important to educate potential donors about the positive changes they make in our community by giving to Inland Empire United Way. There are many effective ways to educate employees. Here are some of our suggestions:

- Have a campaign kick-off and/or employee group meetings. Invite United Way speakers to attend your meetings
- Ask your CEO or Campaign Chair to speak to employees, demonstrating company support
- Conduct fun, educational rallies and events that get people fired up
- Run a short story in your company newsletter about the campaign prior to the kick-off
- Hang posters in key locations throughout your building including the reception area, near elevators, and in the cafeteria and lunchroom
- Distribute United Way pledge cards and materials to each employee
- Include all company locations and shifts
- Participate in company-wide volunteer projects. Your United Way representative can help schedule or contact Hands On for volunteer projects

COMMUNICATE!

At the heart of every successful campaign is effective communication. Here are some suggestions for keeping your co-workers informed:

- Make sure you have an ending date for your campaign and remind employees to get their completed pledge forms in by that time
- Place United Way posters and table tents in key meeting areas and break rooms
- Create signs and banners tailored to your company's campaign
- Create thermometers and graphs to publicize your ongoing results
- Include campaign information in your company newsletter, web site or daily e-mail communications
- Post United Way facts and daily reminders on your company's intranet site

4. Ask Everyone to Give

THE MAJOR REASON PEOPLE DO NOT GIVE IS BECAUSE THEY ARE NOT ASKED – SO PLEASE ASK EVERYONE!

United Way firmly believes that giving is a personal decision. Please allow everyone the opportunity to contribute by supplying information about how United Way changes lives in our community.

- Start at the top – ask executives to set the example by making their contributions early
- Include off-site and remote employees
- Personally distribute contribution forms. Engage your campaign committee to help you.
- Ask everyone to turn in a signed pledge form even if he or she chooses not to give.
- Remind everyone in person that their support is important, and ask if they will consider making a gift.
- Make sure you have an ending date for your campaign and remind employees to get their completed pledge forms in by that time.

It is easy to give:

Payroll deduction is the preferred method of giving. It provides donors the ability to give a larger donation easily. For example:

- A gift of \$250 is less than \$5 per week
- A gift of \$500 is less than \$10 per week
- A gift of \$1000 is less than \$20 per week

Other ways to give:

- Cash / Check
- Credit Cards (Visa and Mastercard)
- Stock transfer

5. Say “THANK YOU” and Announce Results

Wrap up a great campaign by thanking all those who helped you to accomplish your goals:

- Your CEO and campaign chair
- Your committee
- Your campaigners

A little thanks goes a long way:

- Issue a thank you letter or e-mail from the CEO
- Schedule a thank you celebration
- Give out thank you pins, buttons, cards, certificates or other recognition items
- Include a thank you message in your company newsletter
- Publicize your results via your company newsletter, email, intranet or memo

6. Report Results

- Report campaign totals to your payroll department
- Report the results to your United Way representative

CAMPAIGN AT-A-GLANCE

6- 8 weeks before

- Contact your United Way representative to start planning your campaign.
- Secure CEO or senior management support.
- Attend United Way's Employee Campaign Coordinator training.
- Analyze last year's campaign strategy and results.

4 Weeks before

- Recruit an internal campaign committee.
- Conduct planning meeting with committee and train your team.

2 Weeks before

- Conduct a pacesetter campaign. A Leadership giving campaign is a great way to get your campaign started.
- Begin promoting your campaign Kick off and activities.

Week of Campaign Kick-off

- Send CEO's letter endorsing the campaign to all employees.
- Hold an organization-wide kick off celebration; invite UW speaker, CEO and senior management.
- Share pacesetter results.
- Distribute supplies, hand out contribution forms or send e-mail with information if pledging is online.
- Follow up with e-mails and reminders every few days to keep up enthusiasm. Include community facts and success stories.
- Fundraising events, tours and volunteers opportunities.

After your campaign- Close of campaign

- Collect contributions forms.
- Submit contribution forms and report to payroll and United Way.
- Announce campaign results to employees and thank them through a small recognition event or thank you letter. Thank your campaign committee.
- Gather feedback and notes for next year.

CAMPAIGN DETAILS

6- 8 weeks before

- Contact your United Way representative
Our team is ready to assist you from start to finish. Your United Way representative can help you plan and customize your campaign to take advantage of proven best practices.
- Secure CEO or senior management support
Involving your CEO in the campaign planning process early will provide for success later on. Some things that you should discuss with your CEO:
 - A campaign budget
 - Ask this person to provide consistent and visible management support for the campaign. He or she should be a speaker at the kick-off event and closing event.
 - A welcome letter to the campaign and a Thank you letter at the end of the campaign signed by you CEO are very important.
- Attend United Way's Employee Campaign Coordinator training
Your United Way will provide Campaign Coordinator training in July and August. This training is very important, it will provide you with the tools that you need to run a successful campaign. Also it will be informational and will give you a better understanding of what United Way is doing in your community. You will meet other campaign coordinators from local companies, and will get ideas for your own campaign. Get pledge forms, brochures and posters at the training.
- Analyze last year's campaign strategy and results
If possible, talk to prior Campaign Coordinator at your company; discuss how the campaign was handled the year before. Check last year's participation, activities and results. Determine campaign goal and timeframe for this year's campaign. (See Campaign Coordinator Tools)

4 Weeks before

- Recruit an internal campaign committee

Build a campaign team with representatives from all levels of your organization, including:
 - Management: help bring information to management team.
 - HR: to assist in preparing employee rosters, processing pledge forms and providing reports on money raised.
 - Marketing: to promote the campaign and to create fun campaign events (articles in your newsletter, e-mails, volunteer opportunities, etc...)
 - Employees: to endorse the campaign, speak at group sessions and to ensure that every department and branch is asked for participation.
 - Retirees: to coordinate the plan for approaching retired individuals for a donation.
- Conduct planning meeting with committee and train your team.

2 Weeks before

- Conduct an internal pacesetter campaign

A Leadership giving campaign is a great way to get your campaign started.

- Ask your management team to be the first ones to participate.
 - Organize a small meeting with senior management members in the company to educate them about United Way, the programs and needs of your community. They will set an example for the rest of the employees and they will help you create awareness of the campaign.
-
- Begin promoting your campaign Kick off and activities

Week of Campaign Kick-off (See Campaign Coordinator Tools)

- Send CEO's letter endorsing the campaign to all employees.
- Hold an organization-wide kick off celebration; invite UW speaker, CEO and senior management.
- Share pacesetter results.
- Distribute supplies, hand out contribution forms or send e-mail with information if pledging is online.
- Follow up with e-mails and reminders every few days to keep up enthusiasm. Include community facts and success stories.
- Fundraising events, tours and volunteers opportunities.

After your campaign - Close of campaign

- Collect contributions forms:
 - Organize your pledge forms by payroll deductions, one time contributions check, cash and credit card. If pledging is done online, ask your contact at HDQ how to get totals for your location.
 - Place fundraising money separate from one time contribution cash.
 - Make sure each form is signed and dated.
- Submit contribution forms and report to payroll and United Way.
Your payroll department should enter pledge form information in a report. Give final report to your UW representative
- Thank your employees.
Announce campaign results to employees and thank them through a small recognition event or thank you letter. Thank your campaign committee. (See Campaign Coordinator Tools)
- Gather feedback and notes for next year.
Keep a folder with this year's information. If you are the coordinator for next year, these notes will help you improve or change your new campaign. If you are not the person assigned for next year's campaign, this folder will definitely be useful to the new coordinator.