

EMPLOYEE CAMPAIGN CHAMPION'S GUIDE

Dear Champion,

You are essential to the success of our Annual Campaign. Without you, we could not provide the critical funds needed to support invaluable programming within our member agencies as well as many other local non-profits that benefit by designations. United, we can ensure our communities thrive.

Whether this is your first time as a United Way Champion or you are a seasoned veteran, this guide will help you conduct a successful campaign from start to finish.

On behalf of our organizations, United Way, and all of the people served in our five county region, we thank you for coordinating your workplace campaign.

Sincerely,

United Way of the Upper Ohio Valley Team



Know the facts.

Know the Facts About United Way. Did you know that...

- Local social service agency programming serving Belmont, Brooke, Marshall, Ohio and Wetzel Counties, and surrounding areas, rely on annual support from the United Way?
 - These programs serve thousands of local people annually?
 - Local volunteers decide how the money is spent and make sure it is spent wisely?
- 99 cents of every dollar contributed is spent locally? Over 85 cents of every dollar goes to local programs.
 - Volunteers are the backbone of United Way?

Your job as campaign champion, and the way you handle it, is extremely important—YOU can make a difference!



Having fun at Holy Family Child Care and Development Center, Inc.

Getting Started...

Review your past campaign. Find out...

- The extent your CEO was involved. (His/her support makes your job far easier.)
- How many solicitors were involved, and whether all were properly trained.
- What method of solicitation was used (group meetings or one-on-one).
- How much could be raised—i.e., your full employee campaign “potential.”
- What improvements can be made this year to increase participation, levels of giving, and the use of payroll deduction privileges.



SEVEN KEY STEPS TO A SUCCESSFUL EMPLOYEE CAMPAIGN

1 Get the boss behind you ...ask your CEO to help

- Arrange for year-round payroll deductions.
- Approve company time for campaign training, employee meetings, program briefings and/or agency tours.
- Send a letter or email endorsing the campaign to each employee/department.
- Personally solicit top management to “set the pace” for the campaign.
- Endorse United Way at employee meetings.
- Use incentives for giving, i.e. obtain dinner tickets donated from local restaurant, an extra day off from work, etc.

2 Set a goal based on potential

Setting an employee campaign goal provides motivation and enthusiasm throughout the campaign.

Set a Challenging Goal - one based on achieving a higher percentage of the potential you know exists.

3 Organize your Campaign Team

The larger your organization, the more people you will need to involve.

- Include employees from all levels /departments within your organization. Ask a fellow employee to get involved.
- If your company is organized, involve key labor representatives in your solicitation plans.
- Enlist the help of your Personnel and/or Payroll Department. Their help in obtaining a current list of employees and smooth processing of payroll deduction pledges is invaluable.
- Make your campaign a team effort. Ask for your team members help in developing and carrying out your plans.
- Keep communication lines OPEN.

4 Finalize your game plan

- Choose the solicitation method you will use.
 - ◇ **Group meeting**
 - ◇ **One to one**
- Select and train the necessary people to implement the method selected.
 - ◇ For **Group**: Confirm who will be on the meeting agenda with you, assign people to collect pledge cards and follow-up. (See Sample Agenda page 5)
 - ◇ For **One to one**: No solicitor should or can effectively contact more than 15 fellow employees.
- Establish a timetable. Include specific dates for completion of solicitation activity and follow-up.
- Schedule employee meetings, confirm dates, speakers and films.
- Personalize each pledge card, letters to employees, and invitations to employee meetings.

5 Publicize your campaign



- Use company's newsletter to educate employees about United Way and to highlight employees who have used United Way agency services or are United Way volunteers.
- Include United Way promotional "stuffers" in pay envelopes.
- Chart progress in one or more key locations.

6 Report your results

- Make sure all pledge cards have been returned and properly completed.
- Keep an accurate record of your results. Complete the "Unit Solicitation Report" and "Summary of Employee Pledges" cards.
- Submit results to the United Way. Include:
 - a. Copy of Unit Solicitation Report
 - b. Summary of Employee Pledge Cards
 - c. Cash and direct bill pledge cards
 - d. List of designations

It is important that designations are reported to the United Way complete with designated agency name and donors name and address. This insures that agencies receive their designation and United Way agency donors are properly thanked.

7 Say "Thanks"

Never underestimate the importance of a thank you at the end of a campaign. Contributors, as well as those who helped you run your campaign, need to know that their effort is appreciated.

- **Say THANKS!**
- Have CEO send a letter of thanks to all.
- Recognize the efforts of, and formally thank those who helped conduct your campaign
- Publicize the results of your campaign. We can help with this!
- Prepare report evaluating your campaign for next year's Coordinator

Key Events



June 1, 2019



June 29, 2019



September 11, 2019



September 12, 2019



September 28, 2019

Sample Group Solicitation Meeting Agenda

(Personalized pledge cards and campaign brochures are distributed as employees enter.)

- | | |
|---|-----------|
| A. Welcome/Endorsement by Chief Executive Officer | 4 minutes |
| B. Comments by Coordinator/Labor Representative | 4 minutes |
| Remarks supporting United Way | |
| Review of mechanics of pledge card | |
| C. United Way testimonial by employee who went on agency visit, received services or serves as agency volunteer | 3 minutes |
| D. Remarks by United Way volunteer or Agency Representative | 3 minutes |
| E. Close by Coordinator—Thank You | 1 minute |
- (Collection of pledge cards as employees leave meeting.)

No Cost/Low Cost Incentives

- ⇒ Prime parking spaces
- ⇒ Jeans day passes
- ⇒ Company “SWAG” gear
- ⇒ Donuts and coffee
- ⇒ Boss does your job 1/2 day
- ⇒ “Sleep-in” passes

Other Attractive Incentives

- ⇒ Tickets to movies/sports
- ⇒ Trendy electronics
- ⇒ Gym membership
- ⇒ Airline tickets
- ⇒ Gift baskets
- ⇒ Weekend getaway

To get the most out of incentives, consider how best to structure them for you campaign. For example...

By individual: Anyone who gives via payroll is eligible.

By gift level: Anyone who gives xx dollars or more is entered into a special drawing. Set tiers so those giving \$10 weekly are eligible for more than those giving \$1.

By increase: Anyone who increases their gift by ___% over the previous year.



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December 2019



March 13, 2020

**United Way of the
Upper Ohio Valley, Inc.**

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