

Step 1 Make Your Own Pledge

-DO WE HAVE ANY STATISTICS LIKE \$500-will give care to a cancer patient....)

Step 2 Obtain Top Management Support

Step 3 Develop a Strong Campaign Team

Selecting a campaign committee is an excellent way to spread enthusiasm, knowledge about United Way and the workload. Your campaign team should include people from various departments, levels and locations. Educate your team members on United Way's role in the community. If Organized Labor is a part of your company, be sure to include them as a part of your committee.

Management and Labor working together can help ensure a successful campaign. If you are in a small organization, even a team of two will help to plan and implement your campaign. Be sure that you have help in soliciting and following up on pledges, as well as calculating results.

Step 4 Plan Your Campaign & Set an Employee Goal

Carefully review past campaign results and talk with the previous year's campaign coordinator to outline what you want to accomplish and how you can increase employee participation. Ask these key questions:

- ❖ In what areas has your campaign worked well in the past?
- ❖ How can you reach those who haven't given in the past, or encourage those who do give to increase their gift?
- ❖ Is there a segment of your employee population that is not participating or may not have had the opportunity to participate or attend rallies in the past that might benefit from specialized attention?
- ❖ What employees were enthusiastic helpers last year and might like to help this year?
- ❖ Is leadership giving discussed and encouraged at your company?

A critical objective in most companies is educating employees about United Way. Remember – the more your fellow employees know about how United Way works and who is helped, the more likely they will be willing to give.

United Way provides a variety of proven resources to help you plan, promote and conduct your campaign. Printed materials, speakers and agency tours support your efforts and can make a great impact on your employees.

Next, set an employee goal. Setting a goal is one of the most important things your campaign team can do. Set a goal that is challenging, but certainly achievable. Consider your potential. Potential is the amount of money your organization would raise if all employees pledged a "Fair Share" (one hour's pay per month, or one percent of gross pay for salaried workers). Other strategies for setting a goal can be based on increased pledges (Impact Partners) or increased percentage of participation. It is important to understand your potential so that you neither underestimate nor overestimate your ability to raise money.

Planning Timeline

	Date
Meet with United Way representative	_____
Obtain CEO endorsement and support	_____
Recruit campaign committee	_____
Train campaign committee/assign tasks	_____
Develop campaign plan:	
Goal	_____
Timetable	_____
Campaign Method	_____
Publicity/promotions	_____
Incentives	_____
Develop Leadership Giving Campaign	_____

Secure management's approval of plan	_____
Prep campaign materials w/ UW rep	_____
Plan campaign kickoff	_____
Participate in Day of Caring	_____
Schedule employee group rallies	_____
Send letter from CEO to all employees	_____
Conduct employee group rallies	_____
Conduct Follow-up Solicitation	_____
Conduct thank you event	_____
Submit final results to UW rep	<u>by December 2, 2008</u>

Step 5 Build a Best Practices Campaign & Make the Ask

Once you have set a goal, the best way to achieve success is to implement a "Best Practices" campaign. Elements of a Best Practices campaign include:

Payroll Deduction

This is the most encouraged method for contributing to United Way because it makes giving easy and enables employees to make larger contributions.

Other Ways to Contribute

For those individuals who have never participated in United Way and are not attracted to Payroll Deduction, consider encouraging one-time contributions at a minimum level, i.e. \$25. Or, consider special event fundraisers that may appeal to these individuals.

CEO Solicitation of Management Team

Creates the opportunity for the managers to establish a positive momentum for the employee campaign and encourages leadership giving.

Campaign Materials & Pledge Forms

United Way will provide materials and information for you to use in conjunction with your campaign. Posters and brochures are available for display and distribution during the campaign. Pledge forms can be customized to include

each employee's name and any other important information you provide such as location, employee number, shift, etc. If you'd like, the pledge form can also include last year's pledge amount, if applicable, as well as the suggested amount of increase needed if they wish to move up to the next giving level.

Incentives & Special Events

Helps achieve desired campaign results and adds fun and excitement to the employee campaign. **Refer to "Fun-Raising Ideas" found in the back of this guide.**

Campaign Theme

Helps spark employee interest and ties activities together to create a feeling of excitement for supporting United Way. **Refer to "Fun-Raising Ideas" found in the back of this guide.**

Agency Tours

Enables employees to see their contributions at work first hand. Also provides for an excellent time to solicit employees. Your United Way representative can make the arrangements.

Fair Share Ask, Impact Partners & Leadership Giving Society

Encourages employees to consider giving at a level based on their potential. Making a contribution, and at what level, is a personal decision. But by providing an opportunity for employees to pledge a Fair Share gift, become an Impact Partner or become a member of the Leadership Giving Society, you will help your campaign grow significantly. These options are especially attractive to a donor when payroll deduction is offered.

Retiree Solicitation

Allows those who have retired an opportunity to still participate in United Way. This can also enhance your campaign, helping you raise more dollars.

New Hires Solicitation

Allows new employees an opportunity to make a pledge to United Way when they enter the company as part of the hiring process. This helps get employees used to contributing to United Way at the beginning of their employment. It benefits United Way because it helps offset uncollectibles.

Step 6 Publicize Your Campaign & Motivate Employees

In a sense, the United Way Campaign is a celebration - a celebration of caring. True celebrations are fun and uplifting. They get people excited about being involved. The following ideas work best when done prior to pledge card distribution.

Publicize

- ❖ Using United Way Posters Provided
- ❖ Special Events
- ❖ Brochures Distributed Prior to the Rallies
- ❖ Employee Newsletters
- ❖ United Way Screen Savers
- ❖ Morning Announcements with Upbeat Music
- ❖ Displays Highlighting United Way Agencies/Services
- ❖ Decorations, i.e. Balloons, Banners, Signs
- ❖ Flyers Highlighting Employee Campaign Rallies (dates, times, locations, prizes, food, etc.)
- ❖ Public Address, Voice Mail, Electronic Mail System
- ❖ Letter to Employees from CEO

Motivate

Incentives can add spark to any campaign and motivate employees to increase participation and contributions. **See Fun-Raising Ideas in the back of this guide.**

Prizes can be awarded/drawings can be held for employees who:

- ❖ turn in pledge forms early
- ❖ are first-time givers
- ❖ attend an employee rally
- ❖ pledge a "Fair Share" gift (one hour's pay per month or 1% of gross annual pay)
- ❖ increase their pledge over last year (See Impact Partner reference on pledge form)
- ❖ building or dept. with highest percent of participation or achieving 100% participation

Step 7 Hold Group Rallies

The most effective and efficient way to tell the United Way story is through **Group Rallies/Solicitation of Employees**. You reach a wide audience with a consistent message at one time; and you need fewer solicitors, saving valuable time in terms of training and solicitation. Also, your employees feel less

pressure to give. In fact, they may feel encouraged to participate because they can see that their co-workers believe in and actively support United Way.

A must for any United Way rally are speakers and the United Way video. These are two of the best ways to inspire and educate employees about United Way and its services. United Way staff maintains a list of available speakers and will be happy to schedule them for your rallies.



Sample Employee Rally Agenda



1. Opening Remarks & Introduction of CEO Camp. Coordinator 1 min.

2. Personal Endorsement by CEO Chief Exec. Officer 1 min.
 - * *Thank employees for coming*
 - * *Emphasize importance of United Way Campaign*
 - * *Personally endorse the Campaign*

3. United Way Remarks UW Rep. & Agency Speaker 6 min.

4. The "Ask" & Pledge Form Explanation Camp. Coordinator 2 min.
 - * *Impact Partners*
 - * *Explain how to fill out pledge form*
 - * *Explain any incentives that are being offered*
 - * *Ask employees to complete pledge forms & turn them in as they leave*

5. Closing Comments & Thank-You Camp. Coordinator 1 min.

THE ABOVE SECTION STILL NEEDS TO BE DETERMINED

Step 8 Conduct a Follow-up & Report Results

All employees who did not attend a rally or did not respond to the group solicitation should be individually solicited. This ensures that all employees have had the opportunity to participate. One-on-one follow-up solicitation is best, if possible.

Once your campaign has been completed, and you have collected all of the pledge forms, you will need to tabulate the results. Begin by calculating the

annual gift from each employee. Next, separate the pledge forms into these five categories:

- ❖ Payroll Deduction
- ❖ Fully Paid Gifts (cash or check)
- ❖ Credit Card Gifts
- ❖ Direct Bills
- ❖ Gifts of Stock

Next, count and total each category and fill in the supplied report envelope. Be sure to include number of givers in each category, & leadership givers and retirees. Please also include how many full-time and part-time employees you have.

Important!!

Be sure to put the United Way copy of the pledge forms in the envelope and **contact Retta Curneal at United Way to arrange for pick-up (925-7772, extension 18)**. Completed envelopes will be picked up each Friday during the campaign.

All envelopes should be collected by no later than December 2, 2008.

Step 9 Say Thank You and share results year round

A “thank-you” not only shows appreciation, but sets a positive tone for year-round communications and the following year’s campaign. **See Fun-Raising Ideas in the back of this guide.**

Year round communications with your workplace can easily be done via electronic e-mail, posters and/or newsletter articles. Updating your team on the results of the campaign, not only how much was raised, but what was done to make a difference in our communities is important. As the United Way of Southwest Michigan sends facts, articles and stories to you, our Employee Campaign Coordinators, use these in creative ways to help your workplace understand what it is that their donations are doing to advance the common good in our communities.

Step 10 Evaluate Your Campaign

Take time to prepare campaign notes for next year's campaign coordinator. It will save valuable time and they can gain from your experience in order to best understand what works for your company. Ask yourself the following questions:

- ❖ What would you do differently?
- ❖ What strategies worked best for your company?
- ❖ Which employees were of particular help to you?
- ❖ What advice would you give to next year's campaign coordinator?

Share this information with your United Way staff representative.

Incentives...

Think about items your organization may already have on hand to use as gifts or incentives. Many companies use multiple incentives to reward different aspects related to a United Way campaign. Use whatever will be most meaningful to your employees and help generate the results you wish to achieve.

Incentive Ideas:

- ❖ A day off with pay
- ❖ A prime parking space
- ❖ A trophy that travels to the best department
- ❖ A trip (using company frequent flyer points)
- ❖ TV/VCR as a prize
- ❖ Celebrity autographed items
- ❖ Company promotional items
- ❖ Dinner for two at a well-known restaurant
- ❖ Movies passes
- ❖ Gift baskets (i.e. fruit, coffee, snack items, etc.)
- ❖ Gifts contributed by employees (crafts, services, talents)
- ❖ Free round of golf
- ❖ Lunch with the boss
- ❖ 2-hour lunch break
- ❖ Sleep-in late days
- ❖ United Way promotional items
- ❖ Weekend at a resort/bed & breakfast
- ❖ Week off at Christmas or New Year's
- ❖ Tickets to a sporting or cultural event

Special Events...

Generating Excitement for Your United Way Campaign will generate more pledges for your campaign. Form a Committee to assist in the planning. Involve employees from every area of the company. Select a theme or link special activities to create a fun way to raise employees' awareness about United Way.

Special Event Ideas:

- ❖ A "day at the beach" theme
- ❖ Agency theme day – Use partner agency exhibits
- ❖ Agency fair and health test screening
- ❖ An auction

- ❖ Assemble a company cookbook
- ❖ Bagel sale or bake sale
- ❖ Barbecue (with executive cooks)
- ❖ Basketball Shooting Tournament
- ❖ Beautiful Baby Picture Guessing Contest
- ❖ Bike-A-Thon
- ❖ Bingo with donated prizes
- ❖ Brown bag “lunch and learn” workshops
- ❖ Bowling tournament
- ❖ Car rallies – each team/dept. has a race car & team colors
- ❖ Car wash (bosses do the washing)
- ❖ Carnival with games (i.e. ring toss, fish pond, cake walk)
- ❖ Casual dress day
- ❖ Chili cook-off lunches
- ❖ Costume contest
- ❖ Craft Fair
- ❖ Dunk tank
- ❖ Dinner with the CEO/President
- ❖ Employee guessing events
- ❖ NASCHAIR -Executive chair races or Tricycle Races
- ❖ Family picnic
- ❖ Flower sale
- ❖ Garage Sale
- ❖ Game show using United Way trivia or not-so-trivial contest
- ❖ Go on a golf outing

Special Events (cont):

- ❖ Halloween pumpkin carving contest
- ❖ Have a cartoon character as a mascot
- ❖ Have a children’s day
- ❖ Hula-Hoop contest
- ❖ Ice cream social
- ❖ Identify employees’ baby pictures contest
- ❖ International potluck
- ❖ Jail and bail day
- ❖ Jelly bean jar guessing contest
- ❖ Miniature golf challenge
- ❖ Pancake breakfast
- ❖ Pep rally
- ❖ Pie in the face
- ❖ Pizza party
- ❖ Popcorn & movie theme
- ❖ Print testimonials, quotes (i.e. volunteers, recipients, contributors)
- ❖ Put celebrity endorsements on voice mail

- ❖ Put a reminder in fortune cookies
- ❖ Putting contest or Putt-Putt contest
- ❖ Radio-controlled car races
- ❖ Raffle
- ❖ Rent a boss, \$5 for half-hour
- ❖ Rent a popcorn machine
- ❖ Send cookies or balloon-a-grams
- ❖ Serve popcorn during the campaign video
- ❖ Silent Auctions
- ❖ Softball or volleyball game
- ❖ Stage a "rap" performance
- ❖ Tailgate party
- ❖ Talent show or skit
- ❖ Treasure or scavenger hunt
- ❖ UW bingo – using partner agency names/UW statistics/information
- ❖ UW coloring contest for employees' children
- ❖ UW Olympics Video Tape –
- ❖ A Day in the Life of...
- ❖ Visit a United Way Partner Agency
- ❖ Volunteer for Day of Caring
- ❖ Wagon relay
- ❖ Walk-A-Thon
- ❖ White elephant sale
- ❖ Yo-Yo-Thon

Campaign Theme...

Involve your campaign team in the selection of your theme to help them become involved right from the start.

Example Campaign Themes:

- ❖ Go for the Gold: *Olympic themed activities*
- ❖ Paving the Way for a Better Community: *road construction themed, demonstrate the roadblocks needy people face in our community*
- ❖ Wild West
- ❖ Survivor: *Divide the office into two teams and have them battle it out to see who can raise more funds. Learn what it's like to live without necessities, as some who use United Way agencies do.*

- ❖ Make a World of Difference: *A global community theme. Divide each dept. into teams by assigning them a specific country or continent. Arrange a global potluck.*
- ❖ Building a Better Tomorrow: *Use Legos to build a house or structure in a central office space. Each employee that contributes gets a Lego to add to the project.*
- ❖ Stars and Stripes for United Way
- ❖ United Way 007: *Create a detective theme with posters depicting social problems that need to be solved. Clues are given to employees in the form of riddles and each clue has a fact about United Way and its agencies and partners.*
- ❖ Recipe for Caring
- ❖ Breakfast of Champions- Be a Champion of Our Community
- ❖ Favorite Sports Theme
- ❖ Helping Hands
- ❖ Be a Hero to Someone: *based off of a comic book character or TV hero*
- ❖ Reach for the Stars

Ways to Say Thank You...

"Saying thank you" may be the most important thing you do. It may even have a long-term affect on the positive support you are working so hard to achieve. Here is a list of ideas that have worked well for others...

Thank You Cards & Letters:

- ❖ from CEO/President
- ❖ from Campaign Committee Members
- ❖ from President of Union
- ❖ from Child or Adult who has received UW services
- ❖ CEO or Chair delivers them personally
- ❖ Insert in pay envelopes
- ❖ Print in the newsletter
- ❖ Mail to the employees' home address
- ❖ Deliver card with a candy kiss or balloon attached

- ❖ Giant thank you card for office

Thank You Gifts & Awards:

- ❖ United Way catalog items
- ❖ Restaurant gift certificate, candy or baked goods
- ❖ Credits redeemable at company store
- ❖ Certificates or plaques

Thank You Events:

- ❖ Thank you breakfast or lunch
- ❖ Victory rally
- ❖ Ice cream social/barbecue/pizza party
- ❖ Morning bagel/donut break
- ❖ Remember employees during National Volunteer Week in April
- ❖ Purchase tickets to UW Annual Celebration for Campaign Coordinator & volunteers

Public Thank You:

- ❖ Announce final results and report back on how the money is being used
- ❖ Place Thank-You posters throughout your facility
- ❖ Publish a special Thank-You edition of your internal employee communication
- ❖ Place a Thank-You message on the computer, bulletin board, e-mail or voice mail
- ❖ Place a banner in a heavily traveled area

If you have questions or need assistance, please contact your United Way staff representative. We are happy to help you!



**Thank you for volunteering your time
and energy to coordinate this year's
United Way Campaign at your
organization.**

**By partnering with United Way,
YOU make your caring count...
Improve your community...
Create lasting results...
CHANGE LIVES!**

