

**Jackson County  
United Way**



**TEN STEPS TO  
SUCCESS!**

**E**MPLOYEE

**C**AMPAIGN

**C**OORDINATOR'S

**R**ESOURCE

**G**UIDE

## ***Congratulations!***

*You have been chosen for a very important job that will affect thousands of people. Your efforts to raise money for United Way will have positive results all year long.*

*This guide is designed to help you run an effective employee campaign. We have found that if you follow the ten easy steps outlined below, the result is a fun and successful campaign. Good luck as you begin your important work for the people in this community.... And on their behalf, thank you for caring.*

### **1 Get Top Level Support**

Meet with your CEO to secure his/her commitment to accept and support the Campaign plan and goal. First, have the CEO authorize payroll deduction and approve company time for training, employee rallies, and solicitation. As the CEO to visibly show his/her personal campaign support by: writing a letter to employees endorsing the campaign, appearing at employee rallies, soliciting top management to set the pace for the Campaign by giving at leadership giving levels, and approving the employee campaign goal.

### **2 Develop a Campaign Committee**

If you are an employee chair at a large business (over 100 employees), don't try to do it all alone! Recruit a campaign committee which is representative of all segments of your organization including management, hourly, and union. Committee members should be viewed as effective leaders within the organization. If you are an employee chair at a small business, a campaign committee may not be necessary.

### **3 Set a Challenging Goal**

Together with your CEO establish an achievable employee campaign goal. Review your organization's previous history with United Way. Questions to consider include:

- \*How many employees gave last year?
- \*What was the per capita gift?
- \*What was the average gift?
- \*How many people gave through payroll deduction?

Your campaign goal should reach toward higher achievement, both in terms of amounts given and the number of employees who give. United Way staff can supply you with data to compare your giving to averages in your area.

### **4 Make Giving Simple—Set Up Payroll Deduction**

Emphasize payroll deduction as a convenient, painless, and generous way to give. Work with your payroll department to personalize pledge cards with employee names and last year's gift amounts if possible.

## 5 Target Special Giving Groups

Promote United Way's Leadership Giving Program to executives. Leadership Giving is a recognition program for those contributors who make an annual gift of at least \$360 or more to United Way. As denoted in its name, the program identifies leaders in giving, raising the level of expectations among those individuals whose income could allow a greater gift. This, in turn, raises levels of giving among other groups. Solicit executives prior to the general campaign and announce results at your company-wide kickoff. Use United Way's special flyer for potential Leadership Givers.

Keep in mind that few leadership level gifts are lump sum donations; gifts through payroll deduction also qualify, as does the sum of a husband and wife's total gift. Report all names of Leadership Givers to the United Way office.

Retirees are an important source of financial and volunteer support for your United Way programs. The number of retirees is growing at a rate much more rapid than that of the general population. United Way staff can provide you with sample retiree solicitation letters and techniques.

## 6 Select Solicitation Technique

Employees can be asked to contribute one at a time or in groups. Each method has advantages – only you can decide which will work best for you.

- A. One-on-one solicitation involves the personal solicitation of one employee by another, preferably a peer (NOTE: Supervisor-to-subordinate solicitation involves implied coercion and should be avoided!) Individual solicitation is best conducted immediately after a rally, when spirit and awareness are high.

- B. Group solicitation provides a more effective, less time consuming approach to solicitation. Employees are given personalized pledge cards and asked to make contribution at the close of the rally.

## 7 Select and Train

### Solicitors/Volunteers

Again, if you are large organization, recruit key representatives from each department and /or employee group. If individual solicitation is used, you'll need a solicitor for every ten employees. If group solicitation is used, one solicitor will be needed for each group meeting. The following are basic elements to be included in your solicitor and training program:

- Endorsement of United Way by CEO and labor leaders.
  - Review of campaign timetable.
  - United Way file and/or speaker and solicitation of fellow volunteers.
  - Thanks for helping!
- (See meeting outline at the end of this flyer)

A good way to generate enthusiasm is to take solicitors on a tour of United Way agencies. Your team should be well versed in the United Way story and able to handle questions and objections.

## 8 Use Campaign Resources to Publicize the Campaign

Incorporate all United Way supplies and resources into your campaign plan. Educate all employees by issuing company newsletters, memos, posters, bulletin boards, goal thermometers, videos, and payroll stuffers.

# 9 Implement Your Campaign

You've planned your work... now it's time to work your plan. All successful campaigns include certain basic elements.

Remember to...

- A. Personalize all pledge cards.
- B. Promote the use of payroll deduction.
- C. Conduct a short, intensive campaign to keep enthusiasm high.
- D. Have fun! Raffles, contests, drawings, competitions, special events, themes, celebrations are ways to make your campaign different, exciting, and successful. Be creative! Consult with United Way staff for ideas.

# 10 Follow Through, Report

## Results, Say Thanks

Make sure every employee has been asked to contribute. Don't forget those absent from the rally. Report partial results early and frequently to United Way. Complete summary cards and place everything in report envelopes. Turn a copy of your payroll deduction pledges into your payroll office. And.... **MAKE SURE YOU SAY THANK YOU TO VOLUNTEERS AND CONTRIBUTORS FOR THEIR SUPPORT.**

## THE EMPLOYEE GROUP MEETING: "THE 20 MINUTE PACKAGE"

TIME	CONTENT	PRESENTER
1 Min	<b>Welcome</b> <ul style="list-style-type: none"> <li>• Greet employees.</li> <li>• Distribute brochures &amp; personalized pledge cards with the amount of last year's gift indicated.</li> <li>• Outline purpose of meeting.</li> <li>• Introduce CEO or management representative if they are present and receptive to speaking.</li> </ul>	Employee Chair
2 Min	<b>United Way Endorsement</b> <ul style="list-style-type: none"> <li>• Explanation of corporate gift support by CEO.</li> <li>• Endorsement by labor leader or employee who has used United Way services.</li> </ul>	CEO or Senior Management and Labor Representative
15 Min	<b>United Way Speaker and Video</b> <ul style="list-style-type: none"> <li>• Introduce speaker.</li> <li>• United Way Message.</li> <li>• Video (Discuss order of video &amp; presentation with speaker before meeting)</li> </ul>	Employee Chair United Way Representative
4 Min	<b>Campaign Information and Closing Remarks</b> <ul style="list-style-type: none"> <li>• Introduce speaker.</li> <li>• Explain the pledge card, payroll deduction, and any incentives.</li> <li>• Ask for the gift.</li> <li>• Ask employees to complete and hand in their pledge cards before they leave.</li> <li>• Offer to answer questions individually after group is dismissed.</li> <li>• <b>THANK EMPLOYEES FOR THEIR SUPPORT!</b></li> </ul>	Employee Chair