

Information for a Successful Campaign

PLAN, PLAN, PLAN

EVALUATE PAST PERFORMANCE / SET A GOAL / INVOLVE TOP MANAGEMENT

A. EVALUATE PAST PERFORMANCE

Here is an easy way to analyze last year's campaign performance.

$$\frac{\$ \text{last year's employee total}}{\# \text{ givers}} \div \frac{\text{average gift}}{\text{average gift}} = \$ \text{average gift}$$

$$\frac{\# \text{ givers}}{\# \text{ employees}} \div \frac{\# \text{ employees}}{\# \text{ employees}} = \text{percent participation} \%$$

Talk with the previous year's campaign coordinator to learn:

- In what areas/departments did your campaign work well?
- What are your areas for improvement?

B. SET A CAMPAIGN GOAL

Look at your figures from Part A.

- If you had a series of good campaigns with **high participation and average gifts**, consider setting a reasonable **percentage increase** over last year's total gift.
- If the average gift is high, but **participation is low, target a higher participation rate**. A strong education piece about United Way's effect in the community will encourage more people to contribute.
- If **participation is good, but average gifts are low, target a higher average gift**. Consider conducting a Leadership Giving program that targets middle and upper management.

C. MEET WITH TOP MANAGEMENT TO DISCUSS A CAMPAIGN GOAL AND THEIR INVOLVEMENT

With last year's results on hand and a potential goal in mind, set a meeting with your CEO. Reaching this goal depends to a great extent upon the commitment of your CEO.

The following checklist will turn your CEO into a champion of the United Way campaign:

- Showing his/her personal commitment to the campaign through active involvement during meetings, events, direct communication with your employees, and his/her personal gift.
- Setting a challenging campaign goal for your organization.
- Providing the time and resources needed to hold a fun, educational, non-coercive campaign that asks every employee to invest.
- Conducting a leadership campaign for middle and upper management.

- Making or increasing a (the) corporate gift.
 - Asking employees to invest as they are hired.
 - Actively involving your retirees in United Way investing.
 - Providing information to employees about ways that they can be involved with United Way of Licking County.
 - Distributing and posting United Way information at your workplace.
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Helpful Hint

Keep in mind that 90 percent of your time is spent planning and organizing your campaign and only 10 percent is spent running it.

RECRUIT AND TRAIN YOUR TEAM

Your campaign team can help spread enthusiasm and information about United Way and your company campaign. The size of your team depends on the number of employees and the number of locations you have. Even if your organization is small, it is beneficial to have help with the campaign.

Recruit employees who:

- Are generous donors
 - Were enthusiastic members of last year's team
 - Have benefited from, or volunteered for, a United Way program
 - Have served on United Way Committees
 - Participated in Day of Caring
 - Coordinate the company newsletter, public relations, communications or marketing
 - Represent a variety of departments in your company
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Helpful Hint

Try to include the informal leaders of your company.

These people already have the respect and trust of their co-workers and will be influential when it counts.

Schedule a training session for your team. Training will not only help to motivate your team but will also improve their skills.

USE UNITED WAY'S CAMPAIGN RESOURCES

The most important thing you can do to increase campaign results is to educate employees about how investing in United Way benefits our community. Also, United Way can help you to schedule speakers for employee meetings.

Campaign Materials

United Way provides a variety of educational materials to assist in your campaign. ***Please help us keep our fundraising costs low by returning items such as campaign materials, banners, posters, etc. when you are finished running your campaign.***

Communicate Your Goal

Incorporate your company’s goal in your campaign’s publicity. Many companies like to use United Way Goal posters placed in prominent locations throughout the workplace.

Your campaign success is directly related to the involvement you generate from your fellow employees. So start spreadin’ the news! You’ll find lots of ideas in the Incentives and Fun Event Ideas section of this packet.

Also, consider:

- A letter or verbal endorsement from your CEO
- Thank you letters
- Solicitation letters to your retirees
- Your Marketing/PR/Communications resources
- Email "Thank You" cards

Be sure to have cards available at all employee meetings – people respond to speakers and recognition opportunities at meetings.

MEET AND EAT!

It’s finally here. ***The main focus of your campaign will be your group meeting or kick-off.*** This can be as elaborate as a company picnic for hundreds, or a simple morning meeting with coffee and donuts.

Helpful Hint

Implement some fun incentives to help reach your goal.
 Some companies encourage friendly competitions between departments.
Make sure that you HAVE FUN!!!

The group meeting for employees is at the heart of an effective employee campaign. It is your primary opportunity to tell the United Way story to your fellow employees. Keep the tone lively, brief and informative. Here is a suggested agenda that takes just 10-15 minutes!

PROGRAM	BY WHOM	TIME
Distribute Personalized Pledge Forms and Brochures prior to meeting or as attendees arrive		
Welcome & Overview (Purpose of meeting, what you will present, etc.)	Employee Campaign Coordinator (ECC)	2 minutes

Campaign Endorsement (Explain why you support United Way, share experiences, etc.)	CEO	2 minutes
How United Way Helps AND/OR United Way Video	United Way Loaned Executive/ECC	3 to 5 minutes 3 minutes
Collect Pledge Forms as attendees leave (If soliciting by group)	ECC	
	TOTAL:	10 to 15 minutes

Thank You, Thank You, Thank You!!!

MAKE THE ASK!

Helpful Hint

The **number one reason** that people do not give to charitable organizations is because **they are not personally asked** to do so. Who knows how many of the people you will ask to give this year, will do so just because you made the extra effort?

Please ask every employee using either group or individual (face-to-face) solicitation and encourage payroll deduction gifts. **Remember, people give to people, so don't overlook this critical step!**

Group Solicitation

As employees enter the group meeting, distribute personalized pledge cards with a copy of the campaign brochure. Emphasize the importance of the contributor's signature on the pledge card for payroll deductions. Employees should turn them in at the end of the meeting.

Follow up with everyone. This ensures that all employees have the opportunity to participate.

Individual Solicitation

Following your employee group meeting, a team member or you should visit fellow employees face-to-face to ask for a gift. **Thank everyone, even if they choose not to give.**

New Hires Solicitation

As new employees are added, this is the perfect opportunity to give them the option to participate in your United Way campaign and get involved in the community.

Leadership Giving Solicitation

Don't forget to follow up pledges with middle and upper management. This is a critical piece to your campaign

REPORT THE RESULTS!

Please review the following steps to report employee campaign results and return pledge forms to the United Way office for reporting purposes.

Step 1 - Complete the corporate pledge form and obtain the CEO or decision-maker signature and report the amount on the campaign envelope.

Step 2 - Collect all employee pledge forms. **Review all information for completeness and accuracy.** Check form for signature. Sort all employee pledge forms by method of giving. Separate fundraisers, payroll deduction pledge forms, cash/check pledge forms, credit card pledge forms and bill donor pledge forms.

In the box provided **please fill in the total number of company employees.**

Total the amount of cash/checks collected from fundraisers and place that amount in the appropriate box on the campaign envelope.

Total the employee pledge forms by method of giving and record the number of givers and the total pledge amounts collected in the appropriate boxes on the campaign envelope.

Total the amount of cash and checks you are enclosing in the envelope. Paper clip cash and checks to the related cash/check employee pledge form. Please do not staple cash or checks to pledge forms.

Record whether the campaign envelope reflects a final report from your company.

Step 3- After the pledge forms are counted and the campaign envelope is completed you should insert all the forms in the envelope and seal the envelope. Employee pledge forms and related cash and checks should be inserted in the campaign envelope; also include a list of Leadership givers and their pledge. (For Leadership givers only, please check to make sure the pledge form contains how they would like their name to appear in our Leadership materials.) Call your United Way contact person to pick up the completed envelope. If requested, you will be provided a receipt by the United Way person that collects your envelope.

Helpful Hint

Keep a notebook or file of your plans for next year.
You or your successor will be glad you did!

SAY THANKS!

"Thank You." These two simple words not only show appreciation, but also set a positive tone for year-round communications and next year's campaign. Here are some ideas that will help you conclude your successful campaign.

- Announce company and community campaign results
- Publicly announce winners of prizes.
- Send a thank you letter to each company contributor
- Write a thank you editorial in your company newsletter
- Sponsor a "Thank You" breakfast, luncheon, or reception for your contributors or team. This can be as simple as coffee and donuts or cake and punch.
- Distribute thank you awards, mugs, pens, buttons, etc. to campaign team and/or contributors.