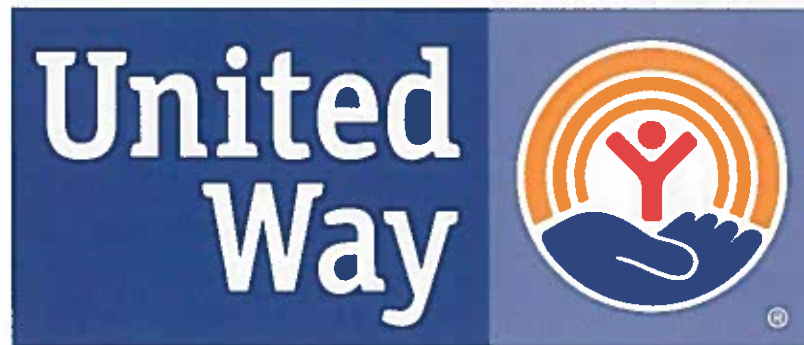


LIVE UNITED



United Way of Tompkins County

ECC Campaign Guide: How to Run a Successful Campaign

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INTRODUCTION

Employee Campaigns allow all employees in a company to multiply the impact of their gifts by contributing to the United Way of Tompkins County (UWTC) together. These campaigns bring your employees closer by giving them an opportunity to give back to the community as a team, and support local programs and agencies that help improve lives throughout Tompkins County.

As the Campaign Coordinator, you will organize, manage, and supervise the United Way campaign at your workplace. The following guide offers you strategies to plan your team's campaign, and includes some "Best Practices" that will help you make your campaign successful.

PLANNING YOUR CAMPAIGN

The best strategy to run a successful campaign is to plan long and run short. The most successful Employee Campaigns start with good planning before campaign season, and run for a short period (usually 2-4 weeks.) Organization keeps your campaign from running too long, and helps everything run smoothly.

The first step in any campaign is to create a work plan as a road map for organizing the rest of the campaign. It should have a definite outline of contact information, deadlines, event dates, and objectives for the entire campaign. Be sure to leave some room for last-minute adjustments and feedback from your CEO, president, and Campaign Committee.

Don't hesitate to reach out to UWTC's Resource Development team for assistance planning your Employee Campaign. They can provide insight and ideas that have been successful in the past, and are happy to guide you and your team in organizing and running your campaign.

Get Top Level Support

Coordinate planning efforts with your company's president or CEO. Their endorsement legitimizes the campaign, boosts morale at office-wide events, and encourages other employees to donate. Encourage them to send letters supporting the campaign to employees throughout the company. The more invested the top level management is in their United Way campaign, the more successful the overall campaign will be.

Forming a Committee

If you work with a larger organization, it may be helpful to create a Campaign Committee including a representative from each department. This committee should

include representatives from every level of the company who are passionate about working with the United Way and committed to improving their communities. The ideal committee size depends on the size of your business; if necessary, divide members into subcommittees.

Begin forming this committee by reaching out to employees interested in working with the United Way. Hold an information session about the campaign itself, committee members' duties, and different ways for employees to get involved. Collect contact information from members, and follow up with them after the meeting to see if they are still interested in joining.

If your workplace already has a Campaign Committee, there will likely be an established protocol for choosing campaign members. Whether new members are elected, volunteers, or applicants, reach out to them at least a week before the first campaign meeting to confirm their participation.

Once this group has been established, they should be trained to run different aspects of the campaign, including:

- Fundraising
- Promotion
- Volunteering
- Campaign management

Previous committee members should help train new members and new hires. New boards should work with their United Way representative to develop and conduct training sessions.

Establish a regular meeting schedule on a shared campaign calendar. Every member of the committee should have access and editing privileges for this calendar. Each meeting should follow an action-oriented agenda addressing current and upcoming tasks, including scheduling promotional materials and planning events.

Succession Planning

As part of your initial planning meetings, establish a plan of succession. If members of your Campaign Committee retire, leave the company, or cannot participate in next year's Campaign, you must select and train their replacements. New members can be chosen by:

- Nomination from a departing Committee member
- Selection by the Committee, Campaign Coordinator, CEO, or president

- An application process
- An open call for volunteers

Following this process, new members should meet with their predecessor and the Campaign Coordinator for a brief training session. Training can be done individually or in group orientations.

Ordering Materials

UWTC produces yearly campaign materials available to all Campaign Coordinators and chairs, including:

- Signs and posters
- Pledge cards
- Merchandise (hats, mugs, pens, t-shirts, etc.)
- Free literature for distribution
 - Brochures
 - United Way “Year At A Glance” Infographic
 - Special Initiatives
 - Success Stories
 - What Happens To My Gift?
 - Annual Events Calendar

Make sure to order these materials early from the Resource Development team at UWTC and schedule what to distribute throughout the campaign. Be sure to order enough Pledge Cards for each employee and extras for office events.

Set a Reasonable Goal

Before determining your campaign’s final goal:

- *Review previous campaign records:* Use previous records to understand previous recruitment strategies, giving trends, employee donation patterns, establish a campaign goal, and plan other events.
- *Know your donors:* Look for departments with low participation rates in last year’s campaign, and brainstorm ways to reach out to them.
- *Engage your audience:* Get your co-workers at all levels involved in the campaign. Figure out which agencies and programs they support and include their suggestions.
- *Make the process fun:* Plan some activities that will bring your office together to support a great cause! See the “FUNraising Ideas” list for some inspiration.

Once a reasonable goal has been determined, divide the figure by department (if appropriate) and set each department's goal as a portion of the company total. Some challenging goals include:

- Employee participation rates
- Dollar amount raised
- Increasing average donor gift amount
- Increasing individual donations

Use the following sample formula to determine your current goal and its growth potential throughout the campaign:

1. Site Population x (times) 80% participation = # _____

2. Average Hourly Rate x 12 = \$ _____

3. Line 1 x (times) Line 2 = \$ _____

Full Potential = \$ _____

4. Amount Employees Contributed Last Year = \$ _____

5. Line 3 - (minus) Line 4 = (Growth Opportunities) \$ _____

6. 20 % of Growth Opportunities = \$ _____

7. Target for 2016 Campaign (add Lines 4 & 6) = \$ _____

Suggested Challenge = \$ _____

Kickoff Events

Many businesses host Campaign Kickoffs with food, activities, and United Way-affiliated speakers for their employees. It is a great way to boost morale, encourage networking, educate people about United Way, and promote an enthusiastic initial response to the campaign. These events are also great for collecting initial pledges on the spot. Some potential events include:

- Employee Breakfast/Brunch
- Lunch/Dinner Barbeque or Picnic
- Ice cream social
- Wellness and Health Promotion Day
- Group hiking
- Day of Service
- Silent Auction
- United Way-themed Trivia Contest

Before the Campaign

Two weeks before the start of your Employee Campaign, begin distributing promotional posters and signage. Invite employees to the Campaign Kickoff and other upcoming events through a personalized letter, emails, and social media posts on company pages.

Before the Campaign Kickoff, meet with your Campaign Committee and CEO or president to review plans and duties for the upcoming Campaign.

PLANNING CHECKLIST

At this point in your campaign, have you:

- Reached out to your United Way representative for planning advice?
- Developed a working campaign plan?
- Met with the CEO or president to discuss their support for the campaign?
- Established a Campaign Committee and appropriate sub-committees?
- Trained new Committee members or arranged a date for training?
- Ordered campaign supplies from your local United Way?
- Reviewed previous campaign statistics and discussed potential improvements?
- Created a reasonable campaign goal?
- Divided the campaign goal by each department?

Great! Now it's time to get your campaign started!

CAMPAIGN SEASON

Office-Wide Events

To increase employee participation during the Campaign, plan a series of activities and events to inspire giving and participation. Here are some potential office activities to host during the campaign:

- Raffles
- Bake sales
- Food/personal care item drives
- Special lunches
- Contests
- Dress down days
- Car washes
- Super Bowl/March Madness contests and parties
- Color runs/5Ks
- Office baseball/football games
- Water cooler change jars
- Fundraising competitions
- Office-wide games

For a more detailed list, please see our “FUNraising Ideas” resource.

Speakers

Consider inviting the CEO or president of your company, a United Way representative, or someone who has benefitted from the United Way’s services to speak at your Campaign Kickoff or office event. A familiar speaker helps employees see the direct impact of the Campaign’s work and the reach of their donation within the community.

Group Meetings

Group meetings are a great way to provide information in a relaxed setting. Provide light snacks at the meeting and incorporate activities to keep attendees interested and involved. These meetings provide opportunities to answer any questions, collect informative feedback, and provide a relaxing break during the day.

Promotions and Social Media

Throughout the campaign, distribute promotional materials, including posters, merchandise, mail inserts, and regular emails to remind employees about the campaign. Posters and signage can be hung in break rooms, lunch rooms, and other public locations; feel free to change them out for special events!

Social media is critical to your campaign’s success. Using Twitter, Facebook, and other company platforms helps your coworkers stay informed of upcoming events and the benefits of participating in the campaign. Include social media posts on your calendar, or use a service like HootSuite or Tweetdeck, to ensure announcements are posted on time.

Solicitation

There are many methods and tips available for how to improve your effectiveness when asking people to donate. Please see our “Solicitation Guide” resource for more information on Individual, Group, and Corporate Solicitation strategies.

Employee Participation

Employee participation is the heart of the campaign. Here are some different ways to get employees involved beyond donations:

- Host In-Office Events
- Connect Different Departments
- Sponsor A Service Trip
- Provide Giving Incentives
- Start a Step Up Program
- Recognize Active & Loyal Participants
- Organize a Volunteer Service Event
- Host a Food/Personal Care/Book drives
- Booths At Local Events

CAMPAIGN CHECKLIST

At this point in your campaign, have you:

- Planned and hosted a kickoff event?
- Hosted other events to encourage employee participation?
- Invited speakers from the United Way to staff meetings and events?
- Scheduled group meetings about the Employee Campaign?
- Posted promotional material in highly visible public areas?
- Written and scheduled social media posts for the duration of the campaign?
- Solicited donations from employees through individual and group meetings?
- Involved employees in the Campaign beyond donations?

Nice work! Now it’s time to wrap things up.

AFTER THE CAMPAIGN

Collecting Pledges

Throughout the campaign, pledge cards should be readily available in common areas and collected at an easily accessible point where all employees visit (e.g. break rooms, reception desk, payroll office, etc.). Also consider including them in mail inserts in the weeks leading up to the campaign.

PLEASE FILL OUT THE CAMPAIGN REPORT IN ITS ENTIRETY. UWTC cannot finalize your campaign without it.

During the campaign planning, you established a deadline for collecting pledges and contributions. As that date approaches, it's important to:

- Reinforce that deadline and collect any outstanding pledges by that date.
- Verify that each pledge card was completed accurately and any accompanying payments match the amounts on the accompanying pledge cards.
- Complete your Campaign Report.
- Submit all pledges, payments, and your Campaign Report to UWTC.

Saying Thank You

Once your campaign ends, it's time to celebrate! Host a company-wide event, such as a lunch or party, to thank your employees, Campaign Committee, and leadership for their support and participation.

Include awards and special designations selected by each department for individuals who made significant contributions. Employee luncheons are a great way to say thank you to every member of the company and remind them of their value.

Looking Ahead

Organize a meeting with your CEO or president and the campaign committee to go over the campaign results. Discuss the campaign overall, strengths and weaknesses, ideas for the next campaign, and employees' response to last year's tactics. Plan any training and succession materials for the next committee, and decide if and how you will be electing new committee members. Develop a tentative outline for next year's campaign, and set up a meeting to discuss the details.

POST-CAMPAIGN CHECKLIST

At this point in your campaign, have you:

- Collected pledges from employees?
- Verified that each pledge card was completed correctly
- Written a final Campaign report?
- Submitted your pledge cards, payments, and Campaign Report to UWTC?
- Hosted a thank-you celebration for your employees?
- Recognized outstanding participants and contributors?
- Met with your CEO or president and Campaign Committee to discuss the campaign's results?
- Developed an outline for next year's campaign?
- Determined and trained successors for departing Committee members?

Great job! You're ready for next year!

CAMPAIGN BEST PRACTICES

1. *Make personal contact with your donors.* Whether you meet with them personally or customize Pledge Cards with their names, donors will appreciate the thoughtful effort you've put into the campaign.
2. *Follow up with donors:* After an employee has contributed to the Campaign, meet up with them or send a personalized letter or email to thank them for their participation.
3. *Share stories.* Seeing the United Way's impact on people in their community will motivate your donors and show them the impact of their donation. Please contact the Resource Development team if you'd like to read some of the success stories or see videos of people whose lives have been changed through UWTC.
4. *Obtain top-level support:* The endorsement of your company's CEO or president is vital—their approval allows the campaign to take place and legitimizes it for employees.
5. *Run a short campaign:* Aim for a campaign lasting a few weeks at most. If it continues too long, it will become less effective and a hassle for both employees and the Campaign Committee. Most campaigns run between 2-4 weeks.
6. *Never pressure anyone to donate:* Donations should never be forced—if someone objects to donating, politely accept and let them be.
7. *Thank every donor at least seven times:* The "Rule of 7 Thank You's" will make your donors truly feel appreciated!

RESOURCES AND SAMPLES AVAILABLE

For CEOs and Company Presidents

- Campaign Endorsement/Solicitation Letter
- Thank You Letter

For Campaign Committee

- "FUNraising Ideas" list
- Success Stories & Videos

For Employees

- Campaign Kickoff Invitation
- Solicitation Letter
- Thank You Letters



CONTACT US

The United Way of Tompkins County is more than happy to help Coordinators during any stage of their Employee Campaign. If you have any questions or concerns, please contact the United Way of Tompkins County Resource Development Team:

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Thank you for your support, and happy campaigning!

