

# EMPLOYEE CAMPAIGN COORDINATOR GUIDE



*Thank you for coordinating your organization's United Way campaign! As one of many employee volunteers, you are now part of a community-wide effort that will support critical services for thousands of people across our community.*

*Erika Dvorske*

Erika Dvorske  
President/CEO

## WHY UNITED WAY? BECAUSE IT'S...

### LOCAL

Your donation stays here in Douglas County, supporting local programs across 24 Partner Agencies, making United Way the best way to help the most people.

### PROVEN

United Way is a proven, organized system that continuously evaluates our Partner Agencies and the services they provide to meet community needs. In addition, United Way has established the **Community Impact Fund**, which fosters collaboration across the community to address specific needs in a creative and non duplicative way.

### ACCOUNTABLE

Volunteers review agency outcomes and budgets. United Way makes sure your gift supports programs that have proven they are making a difference in our community, making United Way the smartest way to help the most people.

### EFFICIENT

Through the extensive use of community volunteers like you, a small staff, and a commitment to this community, United Way of Douglas County is able to maintain low overhead, ensuring your investment goes where it has the greatest impact.

My Campaign Executive is: \_\_\_\_\_

My Campaign Executive's email is: \_\_\_\_\_

Direct Phone Number is: \_\_\_\_\_

United Way of Douglas County  
2518 Ridge Court, Lawrence, KS 66046  
843-6626 uwcamp@unitedwaydgco.org  
**www.unitedwaydgco.org**

# TEN BEST PRACTICES



## 1. Create a Winning Team

- Secure support from management leadership.
- Select a campaign committee to include individuals in your organization who are leaders, respected team players, and dedicated to the success/completion of the job.
- Orient your committee to the United Way by referring to campaign materials and the website: [www.unitedwaydgo.org](http://www.unitedwaydgo.org)

## 2. Develop a Plan for Success

- Analyze your prior campaign approach and results.
- Build a plan with realistic goals and a workable timeline.

## 3. Enable Employees to use Payroll Deduction

- Payroll Deduction can be managed on almost all HR systems.
- Payroll Deduction provides the donor an automatic way to contribute a larger amount for purposes of tax deduction.

## 4. Incorporate Themes, Special Events and Incentives in your Campaign

- Generate enthusiasm for the campaign with incentives.
- Add fun with special events.
- Include educational information about United Way throughout your events.

## 5. Offer Tours and Opportunities to share LIVE UNITED Testimonials.

- Encourage employees to take tours of United Way's partner agencies, and share their experience.
- Recruit employees to share their own LIVE UNITED stories with others at your employee meeting.

## 6. Promote, Publicize & Let the Fun Begin

- Begin to promote and publicize your event(s) two weeks before the Kick-Off event.
- Utilize United Way posters, thermometers, banners and e-mail to get the word out.

## 7. Educate your Employees about United Way and Ask Them to Give

- Schedule a Leadership Givers meeting that includes current and potential Leadership Givers of the Spirit of Kaw Valley Association.
- Hold employee meetings to educate donors and potential donors about United Way.
- Provide employees the opportunity to complete their pledge forms.
- Allow your Campaign Executive to share information regarding United Way's Mission and Partners.
- Invite the company CEO to publicly support the campaign.

## 8. Offer Retirees and New Employees the Opportunity to Support United Way all year

- For retirees, invite them to a meeting, send out mailings or encourage them to pledge online.
- Throughout the year, offer new employees the opportunity to enroll in payroll deduction upon being hired (include part-time and seasonal workers).

## 9. Campaign Wrap Up and Reporting Results

- Record and report success so that the community will know.

## 10. THANK EVERYONE WHO HAS PARTICIPATED

- Your campaign is complete, so celebrate your success!
- Hold Victory Celebrations to say THANK YOU to your employees for contributing.
- Remind employees of the community's campaign timeline, and the announcement of success.
- Recognize Loyal Contributors with a Recognition Poster.

# Best Practices Checklist



At United Way, we believe that each campaign should be tailored to fit your organizational culture. The following checklist will help you organize best practices to ensure a successful campaign. Please keep in mind that your United Way Campaign Executive will work with you every step of the way.

## Step 1: Create a Winning Team

Team Players:     Human Resources             Marketing  
                          Information Technology     Divisional Reps  
                          Campaign Executive (include CE in team meetings)  
                          Retiree Ambassador

(# of Team Players depends upon company size. Teams vary from 1-8)

Management     CEO is willing to play a role  
Support             Other management willing to play a role

## Step 2: Develop a Plan for success

Campaign Analysis:  Identify past Strengths/Weaknesses  
                                  Analyze Past Campaign Results (% Payroll Deductions  
   vs. 1 time pledges; % Leadership Participation; etc.)

Develop strategies:  Campaign Timeline     Campaign Needs  
                                  Campaign Goal             Campaign Focus

### **WAYS to GROW your CAMPAIGN:**

*Increase the % of employees participating:*

Volunteer Day of Action in a UW Agency  
LIVE UNITED Testimonial by an Employee  
Company Wide Incentive for Certain Level of Participation

*Increase the amount of the average gift:*

Leadership Giving Solicitation  
Incentives to those who increase their gift  
Convert one time cash gifts to annual payroll deduction pledges  
Start Internal Recognition Program  
Introduce Loyal Contributor's Program

## Best Practices Checklist *steps 3 – 7*

### Step 3: Enable Employees to use Payroll Deduction

Payroll Deduction:  Check with HR or payroll processor to ensure pledge cards  
*(including electronic)* capture all needed information for processing.

### Step 4: Incorporate Themes, Special Events, and Incentives into your Campaign

Incorporate:  Theme  Incentives  
 Company Wide Events  United Way Caring Club  
*(Kick Off and Celebrations)*

### Step 5: Opportunities to hear from United Way Volunteers and Partners

Tours:  Set up Tours (through your Campaign Executive)  
 Schedule Campaign Executive and Agency Representative

### Step 6: Promote, Publicize & Let the Fun Begin

Promote events:  Posters  LIVE UNITED Emails  
 Newsletters  [unitedwaydgco.org](http://unitedwaydgco.org)

### Step 7: Educate your Employees about United Way and Invite Everyone to Participate

Educational Opportunities:  Tours  Brochures  
 \$144 Provides (flier)  UWDC Video (DVD)  
 Guest Speakers  LIVE UNITED Testimonials  
 Campaign Executive Speaking at Events  
 Campaign Tools @ [unitedwaydgco.org](http://unitedwaydgco.org)

Make the Ask:  Employee Meetings  Leadership Givers Meetings  
 Kick Off/Victory  One-on-One Solicitation

CEO Public Support:  CEO presence at Events  
 CEO/President Speak at employee events/meetings  
 CEO Host Leadership Lunch/Breakfast  
 CEO Letter/Email

Capture the Ask:  Pledge Cards *(paper forms available from UWDC)*  
 Record # of people who participated in special events but didn't  
 complete a pledge form.

## **Step 8: Offer Retirees and New Employees the Opportunity to Support the Campaign throughout the Year**

- New Employee Packets (*Request materials from UWDC*)
- Retiree Letter campaign/social event

## **Step 9: Campaign Wrap Up and Reporting Results**

Prior to Campaign Executive Pick Up;

- Gather all pledge forms
- Sort by pledge type (payroll, cash/check, credit card, etc.)
- Total \$ and # of pledges for each type
- Total # of people participating in special events
- Finalize corporate pledge -- notify Campaign Executive of any follow up needed
- Fill out Campaign Results envelope
- Place pledge forms, cash and checks in Campaign Results envelope
- Call the Campaign Executive for pick up
- Send copies of payroll deduction information to your payroll office

## **Step 10: THANK EVERYONE WHO HAS PARTICIPATED**

- THANK YOU Victory Celebrations
- THANK YOU Note Postcards (*UWDC will provide*)
- THANK YOU e-mails
- THANK YOU letter from CEO
- Loyal Contributors Recognition Poster

## 20 Minute Agenda United Way Campaign Kick Off Event

### 2 Minutes - Welcome

Campaign Coordinator, CEO or Committee Member welcomes employees and explains why United Way is important and how the company will support the campaign.

### 2 Minutes - Endorsement

Company CEO provides statements of support, emphasizing the value to the company of community involvement. This establishes a corporate commitment to United Way and encourages company wide participation.

### 4 Minutes - United Way Volunteer or Staff

United Way volunteer or Staff provides an overview of United Way and the impact of its services. This informs the audience of the needs in our community, and offers them the opportunity to participate in addressing those needs.

### 3 Minutes -- Agency Speaker

A speaker from a United Way agency illustrates how employee contributions are making the difference in our community. Speaks specifically to the benefits of United Way support, coordination of services and the ability / need for United Way agencies to work together to address multiple social service challenges.

### 6 Minutes - LIVE UNITED Campaign Video

Campaign video raises the audience's awareness and encourages them to actively support their community by giving through the United Way Campaign.

### 4 Minutes - Wrap Up & Thank You

Campaign Coordinator:

Describes incentives

Talks about Leadership Giving Program

Answers questions

Asks employees to complete pledge forms

Collects pledge forms or sets deadlines for incentives

Thanks everyone

Total -- 20 Minutes