

HOW TO CONDUCT AN EFFECTIVE EMPLOYEE CAMPAIGN

10 STEPS TO A SUCCESSFUL CAMPAIGN

ORANGE COUNTY UNITED WAY

1. ANALYZE PAST CAMPAIGN RESULTS

❖ MEET WITH YOUR UNITED WAY REPRESENTATIVE.

❖ REVIEW PAST CAMPAIGNS

- Review amount pledged
- Number of employees
- Number of givers
- Average & per capita employee gifts



❖ MEET WITH LAST YEAR'S CAMPAIGN CHAIRPERSON TO EVALUATE STRENGTHS & WEAKNESSES

❖ KNOW YOUR UNITED WAY AND COMMUNITY NEEDS

- Request more information from your United Way Representative

❖ DEVELOP A CAMPAIGN PLAN AND TIMELINE. HAVE A START DATE AND AN END DATE; SET A TIME LIMIT OF 2 WEEKS SO IT DOESN'T DRAG ON.

2. HAVE CEO PERSONALLY ENDORSE THE CAMPAIGN.

❖ ASK YOUR CEO TO:

- **Approve company time for planning United Way meetings, agency tours & employee meetings.**
- **Send a letter to employees asking them to pledge their support using payroll deduction. United Way can provide a letter to be used for this purpose.**
- **Set a date for separate Leadership Giving campaign for key management personnel.**
- **Speak at employee meetings about his/her dedication to the community and belief in United Way**
- **Select next year's campaign chairperson to serve as your assistant this year.**
- **Approve campaign plan.**



3. RECRUIT A DIVERSE CAMPAIGN TEAM

❖ PICK POPULAR, RESPECTED EMPLOYEES FROM ALL PARTS OF THE ORGANIZATION TO SERVE ON THE TEAM. WHERE APPROPRIATE, BE SURE TO INCLUDE:

- **Management**
- **Organized labor**
- **Hourly and part-time employees**
- **Support staff**

❖ CHOOSE INDIVIDUALS TO FILL STEERING COMMITTEES SUCH AS:

- **Communications Chair**
- **Data and Finance Chair**
- **Leadership Giving Chair**



❖ WORK WITH THE COMMITTEE TO:

- **Set a campaign timetable**
- **Set financial and other goals**
- **Develop campaign strategy**
- **Select messages or themes**
- **Promote campaign effectively**
- **Choose & train staff to solicit employees directly**

4. SET A CHALLENGING GOAL

❖ EXAMINE YOUR COMPANY'S POTENTIAL FOR INCREASED GIVING. WHAT IF:

- **More people gave through payroll deduction?**
- **More people gave?**
- **Those who already give, gave more?**

❖ SET A CHALLENGING DOLLAR GOAL AND RALLY THE EMPLOYEES TO MEET IT. USE THE UNITED WAY THERMOMETER POSTER.

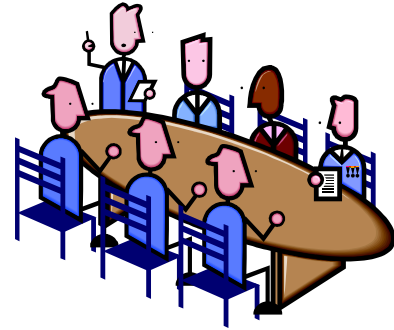
❖ SET SECONDARY GOALS, WHICH WILL HELP YOU REACH YOUR DOLLAR GOAL.

- **Increase participation**
- **Increase number of payroll deduction gifts**
- **Increase Leadership Giving**
- **Enhance employee understanding of who United Way helps**



5. DECIDE WHO AND HOW TO ASK

TRY ONE OR BOTH OF THESE METHODS:

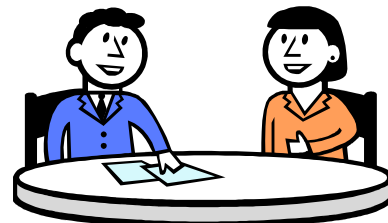


❖ GROUP MEETINGS:

- **Employees come together to hear a short (20-minute) presentation and make their pledge**
- **Those unable to attend are solicited one-on-one at a later date**

❖ ONE-ON-ONE:

- **Employees are asked to make a pledge by another employee (sometimes called a solicitor who is preferably a peer)**
- **Choose one solicitor to solicit every ten employees**
- **Arrange training for your solicitors and/or campaign team by a United Way staff representative**
- **Provide solicitors with a list of employees to solicit, personalized pledge forms and brochures**
- **Monitor progress weekly**



6. EDUCATE EMPLOYEES ABOUT UNITED WAY

❖ USE YOUR IN-HOUSE NEWSLETTER, E-MAIL AND/OR PAYROLL STUFFERS TO EXPLAIN HOW UNITED WAY HELPS PEOPLE RIGHT HERE IN ORANGE COUNTY.

- Interview an employee who has been helped by a United Way supported program
- Interview an employee who has volunteered for United Way
- Learn about the Community Care Fund and the Allocations Process and be sure your employees understand how it works

❖ TALK TO YOUR UNITED WAY REPRESENTATIVE. HE OR SHE CAN PROVIDE IDEAS TO MAKE YOUR CAMPAIGN A SUCCESS.

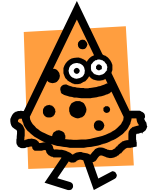
❖ USE YOUR UNITED WAY MATERIALS.

- Posters
- Brochures
- Thermometers



❖ **USE INCENTIVES OR PRIZES TIED TO YOUR CAMPAIGN GOALS.**

- **Pizza party for the department with the highest participation**
- **Dress Down Day for increased giving or reaching goal**
- **Raffle off a reserved parking space, ½ day off, gift basket, gift certificate, etc.**



❖ **COMMUNICATE YOUR COMPANY'S GOAL TO EVERYONE IN THE ORGANIZATION.**

❖ **CHART CAMPAIGN PROGRESS BY POSTING AND UPDATING THERMOMETERS IN HIGH TRAFFIC AREAS (lunch rooms, hallways).**



7. HOLD A SEPARATE LEADERSHIP SOLICITATION

- ❖ ASK YOUR CEO TO CHOOSE A SENIOR MANAGER TO COORDINATE SOLICITATION OF MANAGEMENT PERSONNEL.**
- ❖ SCHEDULE MANAGEMENT-ONLY MEETINGS WHICH INCLUDE THE UNITED WAY VIDEO, UNITED WAY CPO AND REMARKS BY THE CEO.**
- ❖ ASK CEO TO SEND A MEMO ENCOURAGING INVESTING IN UNITED WAY AT THE LEADERSHIP LEVEL.**



**8. ORGANIZE GROUP SOLICITATION MEETINGS
AND ASK ALL EMPLOYEES TO INVEST IN
UNITED WAY**

- ❖ **LET YOUR UNITED WAY REPRESENTATIVE KNOW IN ADVANCE THE DATE AND TIMES OF YOUR EMPLOYEE MEETINGS SO THAT HE/SHE CAN ARRANGE FOR SPEAKERS.**

- ❖ **MAKE SURE THAT THERE WILL BE A WORKING VCR AND TELEVISION AVAILABLE.**

- ❖ **PERSONALIZE YOUR PLEDGE CARDS IN ADVANCE OF THE MEETINGS.**

- ❖ **ENSURE THAT YOU HAVE ENOUGH MATERIALS FOR EVERYONE.**

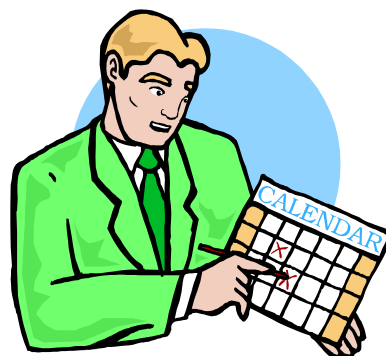


OUTLINE OF AN EMPLOYEE MEETING

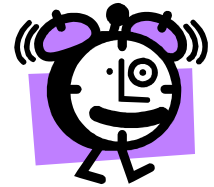
- **OPENING REMARKS:** CAMPAIGN CHAIRPERSON 1 MINUTE
- **ENDORSEMENT:** CEO 1 MINUTE
- **UW OVERVIEW:** UW REPRESENTATIVE 5 MINUTES
- **CAMPAIGN VIDEO** 5 MINUTES
- **SPEAKER:** AGENCY REPRESENTATIVE 5 MINUTES
- **ASK FOR GIFT:** CAMPAIGN CHAIRPERSON 2 MINUTES
- **CLOSING COMMENTS:** CAMPAIGN CHAIRPERSON 1 MINUTE

**Say Thank You
Collect Pledge Forms**

TOTAL TIME: APPROXIMATELY 20 MINUTES



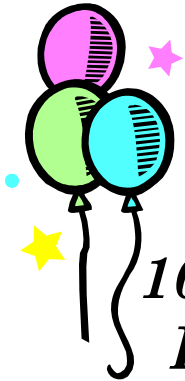
9. MONITOR CAMPAIGN AND REPORT RESULTS IN A TIMELY MANNER



❖ AFTER YOUR CAMPAIGN IS DONE:

- **Complete your campaign summary - included in campaign envelope**
- **Enclose all cash, checks, leadership forms & pledge forms in your campaign envelope**
- **Send all payroll deduction forms to your payroll office.**





10. FOLLOW UP ON OUTSTANDING PLEDGES AND SAY "THANK YOU"

- ❖ **THANK YOUR VOLUNTEERS AND GIVERS AND REPORT RESULTS.**
- ❖ **COMPARE YOUR RESULTS WITH YOUR OBJECTIVES.**
- ❖ **PRODUCE A CAMPAIGN SUMMARY REPORT FOR NEXT YEAR.**
- ❖ **CELEBRATE YOUR SUCCESSES.**

