



EMPLOYEE CAMPAIGN COORDINATION TOOLKIT



United Way
California Capital Region



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WELCOME

Dear Employee Campaign Coordinator,

Thank you for accepting your pivotal role in this year's United Way campaign! I am honored to be your partner in this campaign journey, and your hard work will determine our success and change lives for the better throughout our community.

Campaign Coordinators are ambassadors, storytellers and help communicate United Way's purpose and work in our community. Being an Employee Campaign Coordinator is a big job, and I know you will find the experience to be very rewarding.

Your guide has insights and quick tips to help you and your campaign committee members achieve success. Please look through the materials and visit United Way's website at www.yourlocalunitedway.org for more information and tools. During the campaign, I will be here to answer any questions you might have.

Thanks again for being part of United Way's work to end poverty through education. I look forward to working with you.

Sincerely,

Campaign Manager Name

INSERT PHOTO



United Way
California Capital Region

JOB DESCRIPTIONS

EMPLOYEE CAMPAIGN COORDINATOR

- Develop campaign timeline with United Way representative
- Serve as liaison between Campaign Committee and United Way staff
- Coordinate execution of overall campaign plan
- Organize campaign team
- Arrange campaign meetings and trainings
- Monitor results
- Serve as central contact person for United Way campaign
- Serve as Leadership Giving and Tocqueville Society Chair if those roles are not filled by others

CAMPAIGN COMMITTEE

Your Campaign Committee will help you manage your organization's campaign and communicate with employees about United Way. Ask your CEO or senior executive to help recruit people from all levels of your organization, from each business unit and from every location. Identifying a co-chair to serve as a resource will not only help this year, but also help provide continuity during future campaigns.

The Campaign Committee will:

- Help you review the prior campaign and share new ideas
- Assist in developing your campaign strategy
- Be vital in carrying out your campaign plan

It is critical that you:

- Work with your United Way representative to conduct a training session during the first Campaign Committee meeting. Be sure to include a presentation from the United Way representative about United Way's work in the community so the committee can hear about their campaign dollars at work.
- Establish specific duties for each campaign team member. All responsibilities and time commitments should be communicated when recruiting volunteers. Duties may include organizing volunteer trainings, setting up special events, arranging education opportunities for employees, managing a leadership giving and/or action group element of the campaign, tracking and communicating campaign results and so on.
- Keep your team engaged and informed. These colleagues will become your best advocates for United Way!





CAMPAIGN BEST PRACTICES

United Way will help you assess the strengths of last year's campaign and suggest areas for improvement.

1 Get to know your United Way Representative

- Meet your United Way Representative
- Review United Way materials
- Share and exchange ideas

2 Know your organization's giving history

- Total employee dollars raised
- Percent participation and average gift
- Total corporate dollars contributed (if applicable)
- Number of Leadership Givers (\$1,000+), Women in Philanthropy Givers, Young Leaders Society Givers and Tocqueville Givers (\$10,000+)
- Special events held

3 Obtain support

- CEO and/or senior executives
- Recruit your campaign committee

4 Develop a campaign plan

- Set clear goals
- Decide on a solicitation style
- Work with campaign committee and divide responsibilities
- Create a Leadership Giving and/or Action Group focus within the campaign
- Plan any special events
- Start promoting campaign to employees
- Host kick-off event/meeting with CEO and/or top executive support endorsing campaign

5 Educate employees

- Hold group meeting(s) and Leadership meeting (s)
- Work with United Way's online Volunteer Center to host a volunteer project for your employees
- Invite a United Way speaker to speak about work in the community





6 Promote Leadership Giving/Action Group Participation

- Identify someone on campaign committee to lead this effort
- Develop a plan to identify and cultivate potential leadership givers and/or Action Group Members
- Host a leadership giving and/or Action Group event to promote and set a precedent
- Recognize and publicize results

7 Ask employees to give

- Solicit current and potential Leadership Givers and/or Action Group Members
- Distribute contribution forms or online giving link
- Collect completed pledge forms at end of meeting or consistently monitor online results
- Send "What Your Dollars Buy" or "Success Story" emails
- Announce percent to goal achieved throughout
- Host special events
- Final deadline and goal reminder

8 Say Thank You!

- Send a personalized thank you letter or email to all donors from CEO and/or top executive and campaign committee
- Publicize final results
- Recognize campaign committee members with special thank you



9 Report results

- Gather all completed pledge forms or online results data
- Contact your United Way representative with final results and/or any cash/checks that need to be picked up
- Schedule a meeting to review and tally final totals
- Let United Way representative know when and how final campaign results will come to United Way

10 Take a breath and pat yourself on the back for all your hard work!



SAMPLE CAMPAIGN TIMELINE



8 WEEKS PRIOR TO KICKOFF

- Select executive sponsor and Employee Campaign Coordinator/Campaign Chair

6 WEEKS PRIOR TO KICKOFF

- Have first campaign planning meeting with United Way representative
- Start recruiting campaign committee

4 WEEKS PRIOR TO KICKOFF

- Hold meeting with campaign team and United Way representative to develop specific objectives and strategies surrounding business units and special projects (campaign communications, volunteer activities, special events, kickoff and celebration, Leadership Giving and/or Action Group campaign and so on)
- Set overall campaign goal

2 WEEKS PRIOR TO KICKOFF

- Finalize theme and communication plan
- Finalize any special events and/or volunteer activities

1 WEEK PRIOR TO KICKOFF

- Kick off Leadership Giving and/or Action Group campaign (if applicable)
- Tell the United Way story through articles on your Intranet site



SPECIAL EVENT IDEAS

Special Events can be used to add a little something extra to the campaign. In addition to raising extra funds for United Way, they are a great way to raise awareness during the campaign. Use these activities to further educate employees about United Way, thank employees for their support and have fun! It is great to schedule these activities after the ask has been made for individual pledge form or online contributions.

Key ideas:

- Be creative
- Be strategic when you schedule events during a campaign
- Make it easy for employees to participate
- Involve the campaign team to plan and implement the events
- **HAVE FUN!**

SPECIAL EVENT IDEAS LIST:

- Baby Picture Match Game Bake Sale
- Casual Day or Jeans Day
- CEO or senior executives cook and serve breakfast or lunch
- Chili cook-off
- Cube Decorating Contest
- Dunking Booth
- Employee Talent Show
- Ice Cream Social
- Jail/Bail Out Executives
- Office Olympics
- Wii Sports Tournament
- Parking Lot Picnic
- Pancake Breakfast
- Silent Auction
- Sport Tournament
- Potluck Lunch
- Pumpkin Decorating Competition
- Scavenger Hunt
- Company-Wide Garage Sale
- Trivia Contest
- Parking spot sale
- CEO or senior executives car wash

INCENTIVE IDEAS

Many organizations incorporate incentives into their United Way campaign. Remember, people give when they are educated about the needs and the impact of their gift, but incentives are a fun addition to the campaign. By thinking strategically incentives can:

- Increase enthusiasm and participation
- Increase average gift
- Encourage employees to pledge promptly
- Encourage attendance at campaign events
- Motivate volunteers or participants on the campaign team

Incentives can be incorporated into the budget for a campaign or there are many free incentives you can offer to employees. Ideas include:

- Extra personal day
- Covered or closer parking spaces
- Free lunch in the cafeteria
- Lunch with the CEO
- Gifts from vendors or suppliers
- Jeans/Casual day passes
- Manager/CEO shaves if goal reached
- Organization logo items
- Retail gift card or movie passes
- Sleep in or go home early on your birthday pass
- Department competition and award
- Golf or tennis outing
- Pizza party
- Ice cream social
- Tickets to sporting or cultural events
- Discount card from local vendors

Token incentives or prizes are more effective than expensive items. Many people may react negatively to the idea of a lavish “reward” for giving to United Way and it can seem inconsistent with the spirit of giving, so use your best judgment. A good place to start is to go to your vendors for incentives. It is a great way for them to show how your business is appreciated and their support of United Way.



SAMPLE LETTERS/EMAILS

SAMPLE

CEO ENDORSEMENT LETTER/EMAIL

Dear Friends,

(Company/Organization Name) is proud to run a United Way campaign in our workplace. Last year, because of the caring spirit of our employees, we raised (amount raised in 2015 workplace Campaign) to help families most in need in our community. I am excited about the opportunity we have in front of us to do even more for the community in which we live and work.

In the coming weeks, United Way California Capital Region is launching the Square One Project. The project is United Way's promise to end poverty starting at square one: school. Over the next 20 years, with your donations and support, United Way will make a significant increase in the number of kids who graduate from high school ready for success in college and beyond.

It takes an entire community to make a difference and we need you - can we count on you to help our community?

Thank you for all you do to keep our community a great place to live and work. I hope you consider joining me in making a gift to United Way.

Sincerely,

(CEO Name)

SAMPLE

CAMPAIGN COMMITTEE RECRUITMENT LETTER/EMAIL

Dear (Name),

(Company/Organization Name) is proud to support the community by running an annual United Way campaign in our workplace. It's a great way for our organization to do its part in helping to keep our region a great place to live and work.

I would like to ask for your time to participate as a member of the planning committee; I hope I can count on you! You can help make (Company/Organization Name)'s 2016 campaign the best yet; share your ideas, improve your community and have a lot of fun! This year, our campaign will run (Dates), so please help us get started now.

Our first committee meeting will be on (Date) at (Time) in the (Meeting Room). United Way representatives will be there to give us information about best practices and tips and tools on running a successful campaign.

Please reply to me at (Phone Number) by (Date) so I can order enough refreshments.

SAMPLE LETTERS/EMAILS

Thank you for your leadership and commitment to our community by supporting United Way.

Sincerely,

(Your Name)

United Way Employee Campaign Coordinator

SAMPLE KICK-OFF EMAIL

Subject: Can we Count on You to help our community?

Body: Our 2016 United Way campaign is kicking off! Watch for information coming soon about all the upcoming campaign activities and events. It takes an entire community to make a difference and we need you. Giving to United Way is the best way to help the most people in need in our community!

Thank you for contributing to this year's campaign.

Sincerely,

(CEO Name)

Questions? Make an informed giving decision by going to www.yourlocalunitedway.org for more information about the important work United Way is doing in our community.

SAMPLE THANK YOU EMAIL

Thank you for helping our community!

Because of your generosity, in 2016, we raised (total campaign dollars your company/organization raised in 2016) to make this a better community for everyone in the greater Sacramento area! We also reached (XX) percent participation and had (XX) volunteer hours.

I thank you for being a part of (company/organization name)'s United Way campaign this year.

Sincerely,

(CEO Name)



NONPROFIT OUTREACH PROGRAM

United Way's Nonprofit Outreach Program is a terrific way to connect your employees with the nonprofit agencies who benefit from your generous contributions.

The United Way Nonprofit Outreach Program organizes three types of events:

1. **Speaking Engagements:** Trained nonprofit speakers come to your company to share their experiences, programs and results directly with employees.
2. **Agency Tours:** Groups of employees visit a local nonprofit and receive an in-depth tour of the agency's services and programs.
3. **Agency Fairs:** Multiple nonprofits set up tables at your office so employees can learn about multiple programs at once. Note: Fairs are not recommended for all work environments. Please work with your United Way liaison to determine if a fair is right for you before submitting a fair request

To request a speaker, nonprofit fair or tour, please go to our website at www.yourlocalunitedway.org/outreachprogram

Some guidelines for each type of event:

Speaking Engagements:

- A minimum of 10 employees must be present for a presentation
- Minimum of 3 minutes of speaking time per nonprofit must be allowed

Agency Fairs:

- Maximum event time 2 hours
- Fairs should take place during peak hours to maximize value
 - 11:00am-1:00pm highly encouraged
- Events should be held in high traffic area like cafeteria, etc.
- Events should incorporate other incentives such as music, food, passports, flyers etc. to encourage participation
- Required employee/nonprofit ratio:
 - 50 employees or less: no more than 5 nonprofit agencies
 - 50-100 employees: no more than 10 nonprofit agencies
 - 100-150 employees: no more than 10-12 nonprofit agencies
 - 150-200 employees: no more than 15 nonprofit agencies

ABOUT YOUR COMPANY

Company Name: _____

Company Address: _____

Company Phone: _____

Company Website: _____

Number of Employees: _____

ECC Name: _____

ECC Phone: _____

ECC Email: _____

Campaign Dates: _____

