

# 12 Steps to Success

## Employee Campaign Coordinator Guide



United Way  
of Olmsted County



**LIVE UNITED**

# 12 Steps to Success

## Employee Campaign Coordinator (ECC) Guide

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2. Confirm CEO Support
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4. Review Your Organization's Past Performance
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### 1. Attend Training

Attending training is critical to your success as an ECC. The training will be informative, interactive, and motivating. It is also a great way to meet other volunteers doing the same job you are! Even if you have attended before, United Way works to provide new data and resources not available before. A training schedule can be found each summer on our campaign website.

### 2. Confirm CEO Support

Support from your CEO or top management is crucial to the success of your organization's United Way campaign. Arrange a meeting with your CEO or top management as soon as possible to discuss important details: a budget for the campaign, your payroll deduction program, and the CEO's personal involvement in the campaign. Here are some examples of ways to get a CEO actively involved:

- A personal letter is sent to every employee from the CEO asking to join them in supporting United Way. (see example)
- The CEO speaks at company rally to endorse the United Way campaign.
- Incentives for giving, such as time off, are offered.
- Ask CEO their willingness to do "something" when goals are achieved.

### 3. Recruit a Campaign Committee

Using a committee is a "must do" part of a successful United Way campaign. Recruit a committee to help you plan and organize the campaign. Include members from all levels of the organization. Committee size may vary depending on the size of your organization. Committee makeup could include the following positions:

- Current ECC
- Identified "Up and Comer"
- Rep from PR/Communications
- Last year's ECC
- Rep in the 18-30 yr old age group
- Rep from Production
- Next year's ECC
- Rep from HR/Payroll
- Rep from Management
- Newest hired Executive

**COMMUNITY WIDE KICKOFF**  
Mark you calendars for your committee to attend the community wide United Way Kickoff in early September.

#### Sample CEO Endorsement Letter

Dear (Employee):

Do you LIVE UNITED? Please partner with (Company Name) and United Way of Olmsted County to learn how we can all LIVE UNITED. Each year, we join together for another challenging goal for our company and this year will be no exception. (Company Name) hopes to achieve a goal of (goal amount)!

It's no secret the needs within Olmsted County are greater than ever before. As a company employee, your contribution stays local, to strengthen the whole community. (Company Name) is asking you to support the United Way agenda for advancing the common good in their focus areas of Education, Income, Health, and Community Basics. We support giving back to the community and we believe that your investment with United Way of Olmsted County is the best way to help the most people.

Watch for this year's United Way rally to learn how you can LIVE UNITED. I appreciate your support and thank you

## 4. Review Your Organization's Past Performance

One of the keys to planning a successful United Way campaign is to evaluate past campaigns. Former Employee Campaign Coordinators (ECCs) in your workplace are a great resource for such information. Set up a meeting with your former United Way ECC to answer the following questions:

- What was the total of employee contributions during the last campaign?
- Was there a major special event?
- How many employees contributed?
- How was the campaign publicized and promoted?
- What was the average employee gift?
- What were the best parts of last year's campaign?
- What is the current total number of employees?
- What parts of the campaign need improvement?
- What was the level of CEO or top management involvement in the campaign?
- How were your employees thanked?

## 5. Set Goal

Your goal should be a joint decision between the campaign team and the CEO. To devise a plan to move toward your organization's potential, consider the following questions:

What if...

- everyone at our company gave \$1 more each month?
- the number of new givers increased to \_\_\_\_\_?
- a payroll deduction plan was implemented - or the number of payroll
- deductions in place increased to \_\_\_\_\_?
- the amount given by existing contributors increases by \_\_\_\_\_?
- the number of Leaders in Giving increased to \_\_\_\_\_?

## 6. Determine How to Inform and Ask

It is important that your committee be well-informed about the message you want them to convey. They should be knowledgeable about everything from campaign goals to available United Way literature and support materials.

Information and solicitation can occur in two ways. The first and most effective method is a rally where employees come together to hear a presentation and afterwards each is asked to make a pledge.

Here are some suggestions to make group meetings run smoothly:

- Use a campaign committee to organize the meetings.
- Publicize meetings well in advance.
- Show United Way Campaign DVD.
- Include Speakers Bureau or United Way staff.
- Distribute personalized pledge cards at the meeting.
- Have food!
- Have a campaign committee member follow up with those who did not attend the meeting.
- Provide an incentive for those attending.
- Have fun!

The second form of information and solicitation is the one-on-one approach where individual employees are contacted by a fellow employee. The following suggestions may aid in one-on-one solicitation:

- Recruit one campaigner for every ten employees
- Choose campaigners carefully - the best givers often make the best askers.
- Remember: peer-to-peer solicitation works best!
- Communicate a clear timeline for completing the asks and following up.

### Campaign Help Available On Our Website!

Being a United Way Employee Campaign Coordinator involves effort, dedication, and commitment to improving our community. You are one of many valuable campaign volunteers, working to motivate others to give of their time and resources.

We want to make your work as easy as possible. To help get you started, we have provided many resources on our campaign website at [www.uwolmsted.org](http://www.uwolmsted.org). There you will find helpful information for conducting your workplace campaign. Included are pages on Announcements, Resources, Speakers Bureau, Leadership Campaign, New Workforce Campaigns, Caring Club, and ECC Coordinator and Supplies Registration.

Should you have any questions, please contact:

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## 7. Develop a Campaign Timeline

A timetable can help keep you and your campaign stay on track and in focus. The following are very important tasks that need to be assigned. Accountability is a MUST!

Task	Person Responsible	Completion Date
1. Review past performances		
2. Recruit campaign committee		
3. Set campaign goals		
4. Choose a campaign method		
5. Plan theme		
6. Determine incentives		
7. Schedule & hold rallies		
8. Within 48 hours, follow up with employees who have either missed rallies or have not turned in a pledge card		
9. Deliver results to United Way or call for pick-up		
10. Conduct a company-wide "Thank You" effort		
11. Evaluate campaign and provide a brief written summary for the next ECC.		

## 8. Publicize Your Campaign

Before you go any further, you should start to build excitement about your campaign. Let everyone know you are all working toward a common goal with creative messaging and signage.

Here are some of the best methods for promoting your campaign:

- Use a theme
- Link your intranet or website to the UWOC's website at [www.uwolmsted.org](http://www.uwolmsted.org)
- Publish articles in your newsletter about your campaign and upcoming events
- Share articles and photos with United Way office
- Display thermometers in highly visible areas showing your campaign goal and your daily or weekly progress
- Send messages about your campaign through your interoffice e-mail system
- Distribute flyers in paychecks to announce meetings and events

## 9. Conduct the Campaign

Preparation is the key to conducting a successful campaign. All rallies should have a specific agenda.. Below are sample agendas for a group meeting and one-on-one solicitation:

### 20-Minute Rally

- 2 minutes: CEO welcomes everyone and endorses campaign
- 3 minutes: ECC thanks employees for attending, introduces campaign committee, announces goal and reminds employees to turn in pledge cards when they leave
- 2 minutes: ECC or United Way staff discusses United Way and who it benefits
- 6 minutes: United Way Campaign DVD
- 4 minutes: United Way Speakers Bureau or employee testimonial
- 2 minutes: ECC or CEO wrap-up. Summarize importance, and ask everyone to "PLEASE JOIN WITH ME IN SUPPORTING THE UNITED WAY"
- 1 minute: Say Thank You! and draw for prizes or incentives

### One-on-One Solicitation

One-on-one solicitation also requires preparation. The following are suggestions for carrying out the process:

- Thank the employee for spending time with you.
- Tell the employee your purpose in speaking with him/her.
- Handle each and every concern presented about United Way - ask questions.
- Provide personalized pledge card and explain how to complete it.
- Say Thank You!

## 10. Follow Up

- Collect ALL pledge cards, even from those who choose not to give
- Distribute incentives for those who turned in a pledge card
- Thank everyone who attends, even if they didn't give
- Personally visit anyone who missed the meeting
- Answer any questions, or offer to get answers from United Way staff if needed

### Pledge Cards

By personalizing the pledge cards, you'll increase your campaign's effectiveness. That's because:

- Employees will feel more a part of the campaign and will be more likely to give than if they receive a blank card
- It will allow for easier tracking of outstanding pledge cards

To do this, you will need to plan ahead. Your payroll department may be a good resource for labels. If possible, print their current payroll deduction amount on cards (people often forget how much they pledged the previous year).

## 11. Report Results

Once the campaign has been completed, there are several reports that need to be turned in to the United Way office.

### Report Envelope 1

- Corporate Gifts
- Cash
- Credit Card
- Check
- Direct Billing

### Report Envelope 2

- Payroll Deductions

### Special Fundraising Event Envelope

## 12. Say Thank You!

The most important step in the United Way Campaign is thanking those who gave. By making the givers aware of the importance of their contributions you not only show appreciation, but encourage future giving as well. Here are some thank you ideas:

- Report final campaign results to employees promptly.
- Post thank-you messages **BOLDLY** in highly visible areas. Be creative!
- Have CEO send thank-you letter to the campaign team and employee givers.
- Host a campaign-ending event with free refreshments, entertainment, and any awards.
- Recognize significant achievements by individuals, groups or departments within the organization, as well as your committee.

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