Step-By-Step Guide
How to Manage a Great Employee Campaign

Step 1

**PLAN**

Get to know your local United Way. Meet with a United Way volunteer or staff member for help in planning your campaign and to learn how the United Way helps build our community. Attend the Employee Coordinators Training if possible.

Meet with your company’s CEO to:

- **Review** past campaign results.
- **Discuss** campaign objectives and Appoint a campaign committee.
- **Arrange** for United Way Partner Agency Tour or Fair.
- **Speak** at the company rally or kickoff.
- **Send** a letter to employees endorsing the campaign.
- **Solicit** the top management group personally.
- **Allow** company to provide incentives for participation.

In union workplaces, recommend to the CEO that the campaign committee include union involvement in the planning and organizing of the campaign. The unions have traditionally been very strong supporters of the United Way.

Step 2

**ORGANIZE**

Set a company goal by reviewing past giving history and using the formula:

\[ \text{Goal} = \% \text{ Participation} \times \text{Number of Employees} \times \text{Average Gift} \]

Set a goal based on your company’s potential. It can also be helpful to set specific “mini” goals such as “Increasing \% participation by ___” or “Increasing the average gift by ___”. Strive to conduct a short, intensive campaign; it will keep enthusiasm at a higher level.

Appoint committees and assign tasks to members such as promotions, implementation and follow-up.

Train new solicitors - the United Way staff would be happy to provide training materials and/or a trainer.

Publicize your campaign.

- **Announce** the company goal.
- **Distribute** an endorsement letter from the CEO.
- **Use** signs, posters, thermometers and flyers.
- **Assign** a goal to each department if applicable.
- **Plan** activities. Create friendly competition.
- **Set** your sights on winning a campaign award.
- **Update** employees on campaign progress via email, if possible.
- **Include** United Way information in company publications.

Schedule employee meetings. Contact the United Way office at (517) 203-5024 for support in needs of speakers, videos, etc...
Step 3

ASK EMPLOYEES TO GIVE

Inviting employees to give is the most important part of the campaign. They can be asked in a one-on-one situation or as part of a group presentation. A verbal request is necessary in order to share information about how the United Way helps the community and provide time for the employees to ask questions. Successful campaigns are based on effective dialogue and open communication.

Plan a separate executive meeting to help set a time and date for the executive campaign. Identify possible leadership givers (see bottom of page) with the CEO. The Chief Executive should personally solicit the executive group.

A quality campaign approach is essential. Selecting and training solicitors from each department or work area to personally solicit each employee ensures nobody is overlooked, and any questions can be addressed.

Employee Group Solicitation Meetings/Rallies should last approximately 10-15 minutes. Greet each employee upon arrival. Hand out pledge cards and have pens available to complete the pledge cards at the rally.

1. The coordinator, CEO, Union leadership, and/or or other company representative speaks briefly and personally endorses the campaign. He/She encourages the use of payroll deduction.
2. Introduce the United Way representative who will
   a) Talk briefly about United Way.
   b) Show a video, present an agency, give a testimonial or client profile.
   c) Answer questions
3. Introduce other examples of how United Way helps our community (testimonials, Day of Caring, etc...)
4. Have everyone turn in their pledge cards as they leave if employees are not filling their cards out through peer-to-peer soliciting. Be sure to thank all who attended. Follow up with those who were absent.
Some notes on conducting a Leadership Giving Campaign:

Ask your United Way representative to work with you or your Leadership Giving Chair to develop a Leadership Giving program that best fits your organization. He or she can help develop a plan to:

- Recruit and train a Leadership Giving Team.
- Develop a Leadership Giving plan.
- Identify Leadership Giving prospects.
- Encourage your CEO to visibly support this effort.
- Hold Leadership Giving meetings.
- Follow up with potential givers.
- Say thank you.
- Report names and final results to United Way.

Alexis de Tocqueville Society
- *Ordre de Fraternite*: $75,000 - $99,999
- *Membres de la Societe*: $10,000 - $24,999

Leadership Giving Society
- *Platinum Members*: $7,500 - $9,999
- *Gold Members*: $5,000 - $7,499
- *Silver Members*: $2,500 - $4,999
- *Bronze Members*: $1,000 - $2,499

REPORT AND SAY THANKS

Report Progress
- √ Establish an internal reporting system.
- √ Keep the Chief Executive informed of campaign progress.
- √ Report progress to employees through available sources, such as voice mail, email, posters, thermometers, newsletters etc...
- √ Announce final results, goals achieved.
- √ Turn in your final report to United Way.

Provide Recognition and say thank you
- √ Recognize departmental or team achievement.
- √ Thank key persons for their participation in the campaign.
- √ Thank all contributors and campaigners.
- √ Personally thank the CEO.
- √ Give out United Way pins (if your company has purchased them).