

12 Steps to Success

Employee Campaign Manager (ECM) Guide

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LIVE UNITED™



Sioux Empire United Way

1. Attend Training

Attending training is critical to your success as an ECM. 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 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 as 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. An average of 2 people per 100 employees is a good estimate. Committee makeup could include the following positions:

| | |
|-----------------------------------|---------------------------------|
| Current ECM | Rep from Production |
| Identified "Up and Comer" | Next year's ECM |
| Rep from PR/Communications | Rep from HR/Payroll |
| Last year's ECM | Assigned Campaign Consultant |
| Rep from Management | Assigned Heart Club Coordinator |
| Rep in the 18-30 yr old age group | Newest hired Executive |

COMMUNITY WIDE KICKOFF

Mark your calendars for your committee to attend the community wide United Way Kickoff in early September.

6. Determine How to Educate 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.

Education 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.
- Show United Way video.
- Publicize meetings well in advance.
- Include Agency Speakers 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 education 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!
- Train campaigners to campaign wisely
- Communicate a clear timeline for completing the asks and following up.

UNITED WAY AGENCY TOURS

Attending Agency Tours is one more way to enhance your United Way campaign. Employees have the opportunity to see first-hand how their contributions are working to make the lives of others better and to renew their enthusiasm for the upcoming campaign.

Many companies schedule tours of a variety of agencies so employees can choose which agency to visit. If it is not possible for your staff as a whole, we strongly encourage you and your volunteer committee to tour an agency. Then you can share what you saw with your fellow employees. View the agency tour schedule and sign up on our website at www.seuw.org or contact the United Way office for more information.

Dear Employee:

When we choose to give through the Sioux Empire United Way, we support local human service agencies meeting critical needs and helping people in our community who need it most: our children, homeless and struggling families, victims of rape and abuse, people with disabilities, the elderly, and many others.

There is a growing gap between needs in our community and the resources to meet them. Our help is needed more than ever. United Way is the most efficient investment you can make. More than 90 cents of every dollar raised goes directly toward programs and services. Thank you for playing an important part in making our community a better place to live. Let's all do what we can to make this our best campaign ever. Please join with me in giving to United Way. Our community is counting on us.

Sincerely,
Chief Executive Officer

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 Managers (ECMs) in your workplace are a great resource for such information. Set up a meeting with your former United Way ECM 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 individuals joining the Heart Club (\$500+) increased to _____?

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 |
|--|--------------------|-----------------|
| REVIEW PAST PERFORMANCE | | |
| RECRUIT CAMPAIGN COMMITTEE | | |
| SET CAMPAIGN GOAL | | |
| CHOOSE CAMPAIGN METHOD | | |
| PLAN THEME | | |
| DETERMINE INCENTIVES | | |
| PERSONALIZE PLEDGE CARDS | | |
| SCHEDULE & HOLD RALLIES | | |
| WITHIN 48 HOURS, FOLLOW UP WITH EMPLOYEES WHO HAVE EITHER MISSED RALLIES OR HAVE NOT TURNED IN A PLEDGE CARD | | |
| SEND RESULTS TO CAMPAIGN CONSULTANT AND UNITED WAY | | |
| CONDUCT A COMPANY-WIDE "THANK YOU" EFFORT | | |
| EVALUATE CAMPAIGN AND PROVIDE A WRITTEN SUMMARY FOR THE NEXT ECM | | |

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 SEUW's website at www.seuw.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 tours, meetings and events

9. Conduct the Campaign

Preparation is the key to conducting a successful campaign. All rallies should have a specific agenda, which your United Way Campaign Consultant may help you organize and present. 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: ECM thanks employees for attending, introduces campaign committee, announces goal and reminds employees to turn in pledge cards when they leave
- 2 minutes: Campaign Consultant or United Way staff discusses United Way and who it benefits
- 6 minutes: United Way video
- 4 minutes: Agency Speaker or employee testimonial
- 2 minutes: ECM 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

One-on-One Solicitation

One-on-one solicitation also requires preparation and forethought. 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 pins/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 your Campaign Consultant and the United Way office. The Campaign Report Envelope lists them on the front:

- Employee Summary Report
- Master Payroll Deduction Card
- Cash pledge cards along with cash & checks
- Bill Direct pledge cards
- Automatic Bank Deduction pledge cards (attach voided check)
- Credit Card and stock gift pledge cards
- Evaluate campaign results and write recommendations for next year's ECM and Campaign Committee.
- Heart Club numbers, gift amount and spouse information if applicable

DO NOT return any payroll deduction cards to the United Way. These must be given to your payroll department.

Please remember to call your Campaign Consultant for any questions with paperwork.

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.

1000 N West Ave #120
Sioux Falls, SD 57104
Phone (605) 336-2095
Fax (605) 336-7606
www.seuw.org



Sioux Empire United Way