



United Way of the Wine Country

Employee Campaign Leader's Guide

2008 – 2009



“Supporting your community by Living United.”

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United Way of the Wine Country

Mission:

The mission of United Way of the Wine Country is to improve lives by mobilizing the caring power of our community through leadership, collaboration and funding.

Vision:

We build a stronger America by mobilizing our communities to improve people's lives.

Advancing the Common Good:

United Way believes that everyone deserves a good life: a quality education that leads to a stable job, income that can support a family, and good health. Right here in your backyard, we're working to advance the common good by focusing on supporting youth development, strengthening families, maintaining senior independence and resolving crisis.

Our goal is to create long-lasting changes that get real results and prevent problems from happening in the first place.

United Way's vision for our community is bold: to ensure that local children have health insurance, to provide food and shelter for those in crisis, to reduce and prevent child abuse, to help local youth succeed in school and in life and to help local seniors live more independent, fulfilling lives.

We invite you to be part of the change. Each of us has something special to contribute. Give, advocate or volunteer today. Together, united, we can inspire hope and create opportunities for a better tomorrow.

That's what it means to **LIVE UNITED**.

Focused Funding with Measurable Outcomes

We asked the community and our contributors what they think our toughest issues are. Based on their input, we identified and continue to support the following high priority impact areas.

Supporting Youth Development: With your partnership, United Way is supporting youth development by focusing on health and education, including after school and summer programs that help kids make positive choices and avoid risky behavior.

Maintaining Senior Independence: With your support, United Way is maintaining senior independence by focusing on services that help seniors achieve self-sufficiency in their homes and live more independent, fulfilling lives.

Strengthening Families: Your United Way contributions are strengthening families by focusing on workshops and counseling that help families develop skills to build strong, healthy relationships.

Resolving Crises: United Way is focused on resolving crises in our community by getting kids out of gangs and by offering emergency food and shelter to people in crisis while promoting lasting change in their lives.

Campaign Overview

Your Leaders Believe in You

You were selected to be a United Way Employee Campaign Leader (ECL) because someone in your organization believes you are both capable and compassionate. You are the type of person who cares about people, who has strong organizational skills and who motivates others. You are precisely the person it takes to organize a great United Way campaign in your organization.

Your role as the Employee Campaign Leader (ECL):

As the ECL, you ARE the liaison to the United Way Campaign. The ECL **plans and runs** the company or department's campaign. You are supported and joined by United Way Campaign Advisor, United Way staff, agency speaker and perhaps other company ECLs.

The following are areas that require your participation and implementation:

- **Attend ECL trainings**
- **Build teams: Identify, recruit and lead other employees to serve on campaign team(s)**
- **Work with team to develop strategies through goal setting**
- **Develop creative fund raisers, presentations, games and/or incentives**
- **Coordinate Management appearances**
- **Communicate message of community through inviting employee testimonials and/or Agency Speakers**
- **Be available to answer questions or direct concerns from individual employees to the correct resource, i.e. How do I complete the pledge**

- form? Where does my money go? How does payroll deduction work?
- **Distribute and retrieve pledge forms; calculate results and report totals**
 - **Recognition: Solicit and thank co-workers for contributions and participation**

7 Steps to a Successful Campaign

Although each campaign is unique, the following 7 steps are commonly taken in the most successful campaigns.

- Step 1: Get to Know Your United Way**
- Step 2: Recruit Help to Promote Your Campaign**
- Step 3: Obtain Management Support**
- Step 4: Plan Your Campaign**
- Step 5: Implement Your Campaign**
- Step 6: Report Results and Thank Participants**
- Step 7: Campaign Review**

Step 1: Get to Know Your United Way

As a campaign leader, you can greatly impact the success of the campaign. To help make this impact, you will want to provide information about the benefits of a United Way campaign and understand the role of United Way in Sonoma, Mendocino, and Lake Counties. Your understanding of this information will help complement your credibility as the campaign's primary advocate.

Step 2: Recruit Help to Promote Your Campaign

Recruiting a campaign team may or may not be necessary depending on the number of employees in your organization or department and the level of campaign activity you want. Your decision whether to recruit a team, or not will depend on how you can most effectively engage all employees and gain their full participation. If you can accomplish this yourself, great! If not, a campaign team can help you build energy and excitement while spreading the workload.

If you do choose to recruit a team, it is usually a good idea to include members from different levels of staff. This will ensure that communication about the campaign will be spread throughout the organization or department.

This is also the stage when you will determine the means by which contributions will be tracked, either through payroll deduction or via cash/check contributions.

You should discuss this with your accounting department to ensure their understanding of the means they will use to track contributions during the campaign.

Step 3: Obtain Management Support

This is a very important step. Support for your campaign must be obtained from those at your organization or department's highest levels to attain maximum success. Arrange a meeting with top-level management focused specifically on the campaign. This meeting will give you an opportunity to align your goals with those of management. You can discuss different ways they might get involved to support the campaign, goals and expected outcomes. In doing so, you are letting management know they are a part of the campaign, giving them a vested interest in its success.

Management support before, during and after the campaign may come in many different forms. Such support helps demonstrate to employees that they are not alone in their participation because those at all levels of the organization are involved.

Step 4: Plan Your Campaign

You must decide the most effective means of running your campaign. Before deciding on a campaign strategy, however, you and your campaign team must be aware of your organizational culture.

Every organization or department is different, each with its own unique culture and way of doing business. As a result, campaigns differ, dependent primarily on what may be the most effective presentation style for each group. Some questions to ask yourself when considering your group's culture include:

Is your department big or small? Can the campaign be completed in one week or might more time be necessary? Do your employees already give to United Way? What adjectives describe your co-workers/management? How do your coworkers like to have information presented? Would the best means of reaching them be through visual (posters and video), auditory (voicemail, agency speakers), tech-savvy (website or e-mail) or social (personal contact) means?

At a minimum, United Way will provide campaign brochures and pledge forms at your request; a video is also available to show to your employees. The rest of the campaign presentation is up to you. You may be as creative as you like!

Step 5: Implement Your Campaign

Your role during the actual campaign period is one of assuring that your employees are engaged and the United Way message is being conveyed in the most effective means possible. Good planning of your campaign will make this happen, your campaign team (if applicable) should be supporting you and helping you carry out the campaign successfully.

A Campaign Review may also consist of requesting feedback from campaign team members and individual employees; giving you a sense of what they felt did or did not work well during the campaign. Additionally, seeing your employee feedback would be especially helpful for our purposes in gauging employee reaction to campaign materials.

Step 6: Report Results and Thank Participants

It is very important to report the campaign's results **to your employees** throughout the campaign as well as at its conclusion. A commitment to this will help keep employees focused on the campaign goal while always giving them something to shoot for. Be sure also to report your campaign's results **to United Way**. Pledge forms, checks, cash and statistics you may have gathered about your campaign should be given to your Campaign Advisor or United Way Campaign Manager, Rob Read.

Equally important is the process of thanking employees for participating in the campaign. Many organizations hold thank you events, which give the campaign team and management one final opportunity to thank the employees for their participation.

Step 7: Campaign Review

Reviewing what worked and what may not have been successful in the campaign shortly after its completion is a simple and important step, yet it is often overlooked. This review should be completed relatively soon after the campaign's completion to ensure its freshness in everyone's mind. At a minimum, a short meeting between campaign team members to discuss how the campaign progressed and what did/did not meet expectations would be beneficial for evaluation purposes and for next year's team when deciding on a presentation method. If there was no campaign team and you ran the campaign yourself, simply jot down a few notes about the campaign and what you felt worked well or could have been improved upon.

Hints to Recruiting Campaign Committee Members

These tips will assist your recruitment of committee members:

- Choose individuals who will be committed to promoting the campaign and representing your organization as a leader.
- Choose individuals who have participated in the campaign process in the past.

- There is no specific number of members you should have in your campaign committee. Keep in mind that the goal is to be able to communicate campaign specifics throughout all levels of the organization with ease.
- If you are part of a larger organization, inclusion of all employee levels in the campaign committee will induce better communication about the campaign throughout the entire organization, ultimately leading to better results. Thus, try to include at least one employee from all levels of the organization, including:

Support staff

Management

Professional staff

Payroll

Organized labor (where applicable)

Communications professionals

Tips on How to Involve Management

Here are a few creative and effective ways to involve management in your campaign:

- **E-Mails** – Employees can effectively be reached through e-mail at no additional cost to the organization. More importantly, everybody reads e-mails sent by the Manager or Department Head. Have upper management send daily reminders, campaign statistics, and/or inspirational quotes to employees via e-mail.
- **Letters** – Have the management write a formal letter to employees before the campaign starts, discussing its importance to the community.
- **Participation in Campaign Committee** – Include management representation on the campaign team. This will ensure the topic remains of top priority throughout the campaign.
- **Make Presentations/Appearances** – There will be ample chances for management to make presentations/appearances throughout the campaign. We have found it especially beneficial for management to participate in both the kickoff and thank-you events.

- **Encourage Participation at Leadership Giving Levels –**
Encourage all management to make a commitment to give at a certain level and seek 100% participation.
- **Run a Leadership Campaign Prior to Employee Campaign –**
Set apart a management giving campaign (with its own goals) during the week prior to the employee's giving campaign. Make the results known to the employees, hopefully displaying high levels of participation and involvement by management.

ASK How to make the **ASK** for donations

Closing the rally is the most critical and important part of the presentation. The ECL should practice what he or she will say prior to conducting the first presentation. Here are the main points you want to make. Decide on a brief comfortable way to make these points sound natural when you say them to your friends and coworkers.

- Our community needs our help.
- You, your family, friends or neighbors need United Way programs now or you may need them in the future.
- Please give generously. United Way is the best way to make your caring count, right here at home. Fill out your card right now before you leave the meeting.
- Please consider Leadership Giving—\$20 a week (this amount is the same as giving up one latte per day).
- I've already made my pledge, please join me. It's up to those of us fortunate enough to have jobs to make caring contributions to our community through the United Way.
- I'll be happy to answer any questions you have individually.
- Thank you for coming. Thanks for your support. The people you heard about today will continue to be helped because of your generosity.

Examples of closing...

“Wow, everything we’ve heard today shows what a great investment in our community United Way is. Your gift will go a long way toward solving important community issues. By giving generously, you ensure that United Way programs are there when you, your family, co-workers or friends need them.

I hope you’ll fill out your pledge card right now. I already have. I give by payroll deduction because it’s the easy way to make a gift that really adds up by the end of the year. I’ve found I don’t notice the little bit that gets taken out of every paycheck. I hope you agree that United Way is the best way to make your caring count right here at home.

If you strongly support what United Way is doing, please consider joining the Leadership Circle by pledging \$1,000 or just \$20 a week. If another member of your household also gives at work, you could each pledge \$10 a week and your contribution combined would qualify you for the Leadership Circle.

Thank you for coming. I hope you’re impressed with everything United Way is doing to help our local community.”

How to Process an Envelope

The Employee Campaign Leader (ECL) is responsible for the left side of the Campaign Report Envelope. The campaign Year is 2008 (even though payroll deduction will occur in 2009). Please update the current number of employees and any other company information that might have changed. After you collect all of your pledge forms, separate the white (UW copy) and the yellow copy. Retain the yellow copies for your records. Separate the pledge forms into 3 piles:

- **Payroll deduction pledge forms**
- **Pledge forms with a one time gift of cash or check**
- **Pledge forms with a one time gift on a credit card (or stock transfer)**

Total Company Campaign:

Corporate Pledge: If there is a corporate pledge or match, please show that information in the Corporate Pledge, Pledged column. If the corporate check is enclosed in the envelope also list it as Paid.

Cash/Check Enclosed: Count pledge forms with a check/cash gift attached. Reflect that number on # of Contributors. Total these pledge forms and reflect that number in the Pledged column. The checks & cash should total the pledge

amount and should be entered in the Paid column. Paper clip the check & cash to the pledge forms.

Credit Card: Count the pledge forms that include a credit card gift and reflect here. Total those pledge forms and list under Pledged. Also show this as Paid.

Payroll deduction: Count the pledge forms with a payroll deduction. List under # of Contributors. Total and reflect under Pledged. Do not carry this amount over into Paid.

Special Events: If you also had a special event or fundraiser as part of your campaign, total your cash and checks and reflect that total on Pledged and Paid. Please put those checks and cash in an envelope marked "Special Events" with the total on the front. Seal & put inside your Campaign Report Envelope. Please sign and date under preparer and return to the United Way Campaign Advisor.

Questions and Answers

How much of my money actually goes to serving those in need?

United Way and our community take pride in the fact that 84% of every dollar pledged stays right here in our community to provide services from the local United Way service agencies.

I've never been helped by an agency. Why should I contribute?

United Way of the Wine Country is unique in its focus on community impact. Today's complex problems require proactive, permanent solutions. Our history of leadership enables us to spearhead comprehensive, community-wide change. We are a catalyst, a convener, a collaborator, and a change agent. Our work brings people together to determine the root cause of our community's most challenging problems and to do whatever it takes to achieve measurable and lasting results. No other organization enables a donor's contribution to make such a profound and broad impact across our community.

I feel like I'm being pressured to give to United Way.

No one wants to be pressured into giving. That's why United Way has come out with a firm policy statement against it. In fact, pressure defeats the very idea of voluntary, charitable giving.

I support a favorite charity of my own. Why give to United Way, too?

We all have our favorite charities, and the United Way recognizes the importance of their impact, but the problems of the community are much larger than any one agency can handle. United Way agencies offer a broad mix of programs and services to meet the diverse needs of our total community.

Does my money go as handouts to people who refuse to help themselves?

No. One of the advantages of giving to United Way is the assurance to you that campaign dollars are invested in programs that strive to help people solve their problems and become self sufficient.

***To learn more about United Way,
please visit www.unitedwaywinecountry.org***

Campaign Planning Guide

Employee Campaign Leader/ Campaign Advisor Checklist

ECL and CA complete as a team with copies for both

ORGANIZING THE CAMPAIGN:

Company Name _____

_____ Campaign Dates: Start _____ Finish _____

_____ Campaign goal: \$ Increase _____ % Increase _____ % Participation _____

_____ Group Meetings: # _____ Dates/Times _____, _____, _____

Time allowed for meetings _____

_____ CEO Campaign Endorsement: At meeting? Y/N Notice to employees: Y/N

_____ Executive Leadership Solicitation: Y/N

_____ Agency Speaker:

Employees area(s) of interest _____

Agency requested _____

_____ Video: United Way Y/N Company provided Video: Y/N

_____ Payroll Deduction: Frequency/# of pay periods _____

_____ Corporate Pledge Confirmed

_____ Pledge Sheets: # English _____ # Spanish _____

_____ Incentive Program/Company Awards/Fundraisers:

_____ Internal Communications/Posters/Notices: # UW posters _____

CONDUCTING THE EMPLOYEE GROUP MEETING:

Before the meeting

- _____ Reserve the meeting room
- _____ Confirm the date, time and location with the UW Campaign Advisor
- _____ Confirm company and agency speakers for each presentation
- _____ Set an agenda for the time allotted
- _____ Determine who will make the ASK: the CEO, ECL, CA or a combination
it is recommended that in addition to the CA ASK, the ECL and CEO should reinforce the ASK with their personalized request for support.

Employee Campaign Leader/ Campaign Advisor Checklist (Continued)

Meeting room setup

- Check room for adequate and appropriate seating arrangements
- Arrange for supplies - pens/pencils (providing pens ensures greater % of participation and pledge forms are turned in sooner!)
- Refreshments/snacks (optional)
- Door prizes, incentives (optional)
- Set up and test video equipment

Prior to Presentation

- Confirm with ECL who will handle the *ASK*
- Review agenda with ECL, CEO and Agency Speaker
- Set up and cue video
- Confirm pronunciation of agency speakers name and/or others to be introduced

Reference material Check

- Sign-in sheet (optional)
- Agenda (optional)
- Name of Speakers

Distribution of Material

- Placed on chairs/handed out as they enter, during or after presentation?
- Who will take care of distribution/collection?
- Announce the dates of the campaign/pledge sheet turn-in deadline

Post-Meeting Room Check

- Collect all United Way materials
- Check for personal belongings left behind

COMPLETING THE CAMPAIGN

- Conduct progress reports between CA and ECL during the dates of the campaign
- Meet with individuals not at presentation one-on-one as necessary
- Complete the REPORT ENVELOPE
- Company thank you letters to contributors
- Return excess campaign materials
- Report final figures to CEO
- Make arrangements for drop-off/pick-up of Report Envelope with CA

NEW HIRES PROGRAM:

Retain United Way brochures and pledge sheets for any new hires after the completion of the campaign. Include United Way material as part of company new hire/orientation package. Forward completed pledge sheets to your payroll department and United Way office anytime during the year indicating start date of deductions.