

Employee Campaign

# Coordinator's GUIDE

**“How to Run a Successful Campaign”**



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# T E N

## Thank You!

...for giving your enthusiasm and commitment to this year's Sheboygan & Plymouth Area United Way Campaign. It's because of you that many Sheboygan County residents will receive the services of our outstanding United Way member agencies.

The following information was created to make your job, as the company campaign coordinator, a little easier and a lot more organized. The success of your campaign is vitally important to the overall success of our community campaign. Carefully read through all ten steps and call the United Way office with any questions, comments or concerns – 458-3425.

## STEPS TO A SUCCESSFUL CAMPAIGN

### 1 Confirm CEO/Labor Commitment and Visible Support

The support of top management and labor is essential to the success of your campaign. Ask for their visible support during the employee meetings, special events, or the solicitor training. Ask for their signature on the "CEO/Labor Endorsement" and "Thank you" letter(s) (samples on back page), which are distributed to all employees. Ask for a budget to plan for additional expenses you may incur when developing an incentive plan, thank you gifts or a luncheon on behalf of your committee.

There are many ways to get your CEO/Labor involved. The main objective is for employees to see top management/labor leading the campaign with a sincere effort.

### 2 Attend the United Way Kickoff

Join the United Way volunteers from throughout Sheboygan County for the annual Kickoff event.

### 3 Recruit Campaign Team

Forming a dedicated campaign team is an important way to spread enthusiasm and the workload. If you are in a small organization, even one or two members will help. When recruiting your team, be sure to include representatives from the following:

- Management
- Labor
- Communications staff
- Clerical
- Financial

And, assign specific duties to each member.

# 4

## Set a Goal

Set a reasonable goal. For example, if you had 35% participation last year, aim for 45%. If the average gift was \$50 last year, aim for \$60 (that's only \$0.85 more per month for each employee.)

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## Utilize United Way Resources

Videos, speakers, and agency tours are the three best ways to help your employees understand the importance of United Way. The campaign video is available for your employee meetings, trainings and general use. Speakers from member agencies or campaign/board volunteers can be reserved for employee meetings, as well. Agency tours can be scheduled for a group of people, providing the best “hands-on” look at United Way dollars at work.

Keep in mind, the informed employee will be more likely to become the contributing donor.

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## Plan an Approach

Employees may be asked to contribute at a group solicitation meeting or through one-on-one solicitation. Only you and your campaign team know what will work best for your workforce. See the back page for a suggested meeting outline.

**Group Meeting** – the most efficient method of solicitation. Employees are brought together in a small group to hear the United Way presentation. Personalized pledge forms are distributed, and employees are asked to return completed forms as they leave the meeting. Group solicitation is an efficient use of time, sends a uniform message, requires training only a few solicitors for follow-up purposes, and removes prospective contributors from distractions.

**One-on-One** – encourages a personable approach of one employee to another. Solicitors meet with fellow employees to ask for their contributions, allowing individual time and attention for each potential donor.

**Leadership Circle Giving** – the Leadership Circle is comprised of individuals giving \$500 or more per year. A separate solicitation by key executives for potential Leadership Circle members works best. All leadership givers are listed in the Leadership Circle booklet distributed by United Way.

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## Recruit and Train Solicitors

Solicitors are your vehicle to making your job much easier. These are the people who ask their departments for donations, answer fellow employee's questions and manage the pledge forms.

Solicitors need to be informed. They need to feel comfortable with the United Way facts. Schedule a training session for them to review the video, review the literature and ask questions. The "Solicitor's Guide" was designed to compact all vital United Way information into one piece of literature. Also, see the back page for a suggested meeting outline.

# 8

## Promote and Publicize

People are much more likely to support a cause if they are properly informed. Utilize all United Way resources including posters, newsletter inserts, payroll stuffers, and the video. Distribute materials throughout the building on bulletin boards, above drinking fountains, bathrooms and in the employee eating area.

Please take a look at the enclosed literature for use in your in-house publications and throughout your workplace. Also, read the "Fun Book" for additional campaign ideas.

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## Recognize All Donors

The most important element in earning the long-term positive support you work so hard to achieve is to say "Thank You". You can achieve this in a variety of ways:

- Send a CEO/Labor letter of thanks to all contributors (sample enclosed).
- Announce final results in the company newsletter, department meetings, posted communications.
- Give a small token of thanks to all contributors (i.e. coffee mug, calendar, lapel pin).
- Enclose "Thank You" payroll stuffer in employee paychecks.
- See "Fun Book" for additional ideas.

# 10

## Plan for Next Year

After you've turned all monies in to the United Way office, ask your committee to gather and critique this year's efforts. Host a lunch in their honor and assess the following:

- How successful was this year's campaign?
- What worked?
- What didn't?
- What recommendations do you have for next year's effort?
- List your objectives.

# Company Coordinator Worksheet

## PRE-CAMPAIGN

- Meet with CEO and union representative to confirm commitment.
  1. Set up payroll deduction program (if applicable)
  2. Formulate letters of endorsement
- Recruit campaign committee
- Establish employee campaign goal
- Determine the type of campaign best suited for your company
  1. Group meeting(s)
  2. 1-on-1 solicitation
- Recruit and train solicitors
  1. Recruit solicitors
  2. Schedule solicitor training date
  3. Organize training materials (Solicitor's Guide)

## CAMPAIGN

- Determine United Way resources to be used
- Personalize pledge cards
- Kick-off your campaign
- Schedule employee group meeting(s)/employee solicitation

## WRAP-UP

- Follow-up contacts made for un-returned pledge cards
- Tabulate results and submit report to United Way
- Distribute all forms of Thank You letters/gifts/awards to employees and campaign committee
- Conduct Campaign Critique

## SOLICITOR TRAINING

### SUGGESTED OUTLINE

- I. Welcome and Announcements
  - I. Introduction of Company Campaign committee.  
(Names are announced only when entire committee is present)
- II. Last Year's Company Goals and Results
- III. This Year's Company Goal and Fund Raising Initiatives
- IV. United Way Facts and General Information
- V. The 6-Step Call (Refer to Solicitor's Guide)
  - A. Learn as much as you can about United Way
  - B. Make Your Introduction positive
  - C. Explain the Fair Share guide
  - D. Answer Questions
  - E. Ask for the Pledge
  - F. Say "Thanks!"
- VI. Campaign Logistics
  - A. Hand Out Pledge Cards (Have Pens or Pencils Available)
  - B. Pledge Card Return Deadline (Target Three-Day Turnaround)
  - C. Coordinator Telephone Extension and Office Location
- VII. Questions and Answers
- VIII. Adjournment  
Note: Each solicitor should receive a Solicitor's Guide.

## EMPLOYEE GROUP MEETING

### SUGGESTED OUTLINE

- I. Welcome and Announcements
- II. CEO Endorsement
- III. Last Year's Company Goal and Results
- IV. This Year's Company Goal and Fund Raising Initiative
- V. United Way Facts and General Information
- VI. Video Presentation and/or Guest Speaker
- VII. Union President Endorsement (If Appropriate)
- VIII. Questions and Answers
- IX. Adjournment

Note: The meeting should last no longer than 30 minutes

## LABOR ENDORSEMENT

Dear Brothers and Sisters:

As a fellow member of Local \_\_\_\_\_, I encourage you to consider giving to this year's Sheboygan & Plymouth Area United Way Campaign. United Way supports programs that affect families and friends throughout our community. Programs such as domestic abuse, substance abuse, child enrichment and elderly care are supported by local United Way dollars, addressing areas of need affecting Sheboygan County.

When you give to the United Way, over 85 cents of your dollar is used for the support of agency programs. Slightly less than 15 cents is used for administration and fund raising costs, making our Sheboygan & Plymouth Area United Way the leanest in Wisconsin of all offices raising comparable annual revenue.

Part of the reason our local office is able to run so efficiently is the minimal number of employees. Currently, staff is slightly less than five full-time equivalents. United Way remains effective due to the amount of volunteer support from Sheboygan County residents. Many individuals, representing a cross section of the community, donate their time and talents on a year-round basis.

Please give generously to this year's campaign. You can make a difference in the lives of your friends and neighbors.

Thank you.

Sincerely,

Labor Leader Signature

## CEO ENDORSEMENT:

Dear Fellow Employees:

You know that it takes the cooperation of our entire work force to run this company successfully. The same is true when we talk about the United Way. It takes everyone's contributions to make Sheboygan County a better place to live.

Sheboygan County's community needs range from domestic abuse to substance abuse, elderly care to child enrichment, the unemployed to the physically disabled. Agencies, supported by the Sheboygan & Plymouth Area United Way offer programs which address each of these human service needs. By contributing to the United Way campaign, you're making a difference in the lives of many, including some of your friends and neighbors.

When you donate to the Sheboygan & Plymouth Area United Way, over 86 cents of every dollar is used to fund these programs. Slightly less than 14 cents of every dollar is used for administrative and fund raising expense, making our local United Way the leanest of all United Ways in Wisconsin with comparable campaign revenue.

Our local office remains this efficient due to the mass volunteer support contributed by local Sheboygan County residents. Individuals, like you and I, who dedicate many hours, serving on the Board of Directors and other sub-committees, help raise and distribute funds in the most accountable manner.

Sheboygan County is a great place to live and work because of the people...your neighbors, my neighbors... pulling together to build a better life. The Sheboygan & Plymouth Area United Way helps to enhance the quality of life in our community, and I encourage you to give generously to this year's campaign.

Sincerely,

CEO Signature

P.S. This year's Company Campaign Coordinator is (Coordinator Name). If you have any questions, please do not hesitate to call (him/her) at (Phone Number). Thank you again.

## THANK YOU LETTER:

Dear Donor:

Thank You!

Thank you for donating to this year's Sheboygan & Plymouth Area United Way Campaign. Through support from the employees of (Company Name), the United Way is able to support the services provided by local agencies on a year-round basis.

Your gift enabled (Company Name) to raise a grand campaign total of \$\_\_\_\_\_ for this year's Sheboygan County campaign effort. We are proud to make such a significant contribution to our community.

Thank you again for helping to build a better life in Sheboygan County.

Sincerely,

CEO Signature