Employee Campaign Coordinator (ECC) Handbook

How to bring the Power of Community to your company and lead a great LIVE UNITED Campaign

#ProudToBeAnECC
#LIVEUNITEDCassClay

unitedwaycassclay.org
Get your Campaign Off to a Great Start!

United Way of Cass-Clay has been serving the health and human service needs of individuals and families in Cass & Clay Counties for nearly 90 years. But we haven’t done it alone. Our success is driven by passionate community champions - like you! We can’t thank you enough for your commitment to advancing the common good in our community by serving as an Employee Campaign Coordinator. We want you to know United Way representatives are ready to support you through every step of your campaign.

This handbook is one tool that has been created to help you run a successful campaign. To get started, follow the Campaign Timeline and then move to the Building Blocks. The Building Blocks provide you with ideas, suggestions and best practices. Keep in mind that your United Way representative is ready to assist you at any time.

Campaign Timeline

PRIOR TO CAMPAIGN
- CEO or senior leadership recruits employee volunteers to lead the employee workplace campaign. That selected person will serve as the Employee Campaign Coordinator (ECC).
- ECC attends Employee Campaign Coordinator training in August 2019.
- Establish a campaign goal and campaign strategies with your CEO, employee campaign coordinator and United Way representative.
- The CEO or local senior leadership sends a letter or email to all employees announcing the campaign and it’s dates, and discussing his/her personal support of United Way.
- Send out a reminder email outlining the goal and campaign activities.

CAMPAIGN KICKOFF
- Hold a United Way speaker or kick-off event to promote the campaign, build momentum and provide insight into the power of their gift.
- Have an Impact Speaker at your campaign kick-off meeting. Hear from someone whose life you have changed because of your investment. You can schedule this by emailing UnitedWay@unitedwaycassclay.org or calling 701.237.5050.
- If your CEO or senior leadership is not available, ask him/her to send a kick-off email or voice mail.

DURING THE CAMPAIGN
- United Way presentations are held and employees are encouraged to complete pledge forms and make a contribution to the work of United Way of Cass-Clay.
- Offer incentives for employees to give. (Examples: VIP Parking, vacation day, raffle, apparel, lunch, etc.)
- During this time the Employee Campaign Coordinator provides regular campaign updates by phone or email to their United Way representative including updates on dollars raised.

AFTER THE CAMPAIGN
- Use campaign close out techniques and if necessary, send continuous giving letters to last year’s donors who have yet to pledge for the current year.
- Special event fundraisers (e.g. bake sale) are held to generate additional campaign contributions.
- Final campaign information is sent to United Way. Schedule a time for your United Way representative or Cabinet Volunteer (if assigned) to pick up your packet. Ensure that the appropriate campaign envelope is used - provided to you in your campaign packet. Be sure to fill out all information on the front of the envelope.
- A letter or email is sent from the CEO or senior leadership thanking employees for their participation.
- Recognize your employees for their participation. It can be as simple as a “thank you” at a staff meeting. Employees like to be recognized by their employer. This is a positive way to encourage leadership within your company.
- Remember gratitude is year-round.

YEAR-ROUND
- Include engagement opportunities from United Way’s website & communication in organization newsletters, publications and on intranet sites.
- Invite a United Way speaker to an all-employee meeting to thank the employees for their contributions and provide information on United Way activities and success stories.
- Volunteer. Work with your United Way representative to organize a volunteer activity or visit unitedwaycassclay.org to learn about existing opportunities.
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<th>TASK</th>
<th>DATE COMPLETED</th>
<th>NOTES</th>
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<td>Meet with United Way Staff for a planning meeting.</td>
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<td>Obtain CEO endorsement and support.</td>
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<td>Appoint Employee Campaign Coordinator and recruit campaign committee members.</td>
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<td>Secure a corporate gift or corporate match commitment.</td>
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<td>Determine electronic or paper pledge tool (can do both) and personalize the pledge forms.</td>
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<td>Request management to make appearances at kickoffs, rallies and presentations.</td>
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<td>Develop detailed timeline.</td>
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<td>Develop campaign plan: (If you need 2018 results or data, email Christie Lewandoski at <a href="mailto:clewandoski@unitedwaycassclay.org">clewandoski@unitedwaycassclay.org</a>) • Set goal • Determine marketing strategy • Choose campaign methods • Set incentives • Establish/continue leadership giving program • Arrange for United Way speakers • Plan special events</td>
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<td>Plan company leadership meetings and kickoff event.</td>
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<td>Send email communications to notify staff of United Way campaign activities.</td>
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<td>Send email from top executives to all employees encouraging participation.</td>
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<td>Calculate results to include total dollars, number of donors, number of employees, and leadership givers.</td>
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<td>Report final results to United Way by November 27, 2019 by returning your packet to the United Way team.</td>
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<td>Thank campaign committee and employees with events and letters. Be sure to report results.</td>
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Need help running your campaign? Want to learn more about the work of United Way? Need to order additional campaign materials? United Way has many resources to help you.

- Attend Employee Campaign Coordinator training and you’ll learn how to run a successful campaign.
- Meet with a United Way representative; they can help you strategize and plan your campaign, provide campaign materials, train volunteers and deliver presentations to your employees. Email Christite Lewandoski, clewandoski@unitedwaycassclay.org; Valerie Fechner, vfechner@unitedwaycassclay.org; or Marisa Pacella mpacella@unitedwaycassclay.org, or call 701-237-5050.
- United Way campaign materials are available from your United Way representative and on our website at unitedwaycassclay.org, where you will find more campaign ideas, best practices and campaign supplies.

BUILDING BLOCK 2

Get Management Support and Involvement

You don’t have to do it alone. Involve your CEO and senior leadership in your campaign. It all starts at the top and campaign success is linked to management involvement. They can really help set the tone of your campaign.

- Schedule time for a United Way representative to meet with your CEO or senior leadership.
- Ask your CEO or senior leadership to send letters or emails thanking employees.
- Schedule your CEO or senior leadership to speak at campaign meetings and events to share his/her support for United Way.
- Secure a campaign budget for incentives. If you don’t have a budget, see your United Way representative for ideas and suggestions that don’t cost very much.
Get help! Recruit a committee to work with you on the campaign. Include people from different levels of your organization.

- Committee members can help oversee campaign planning and timeline.
- Committee members can help facilitate meetings, distribute and collect pledge cards, and make the “Ask.”
- A United Way representative can assist you with how to structure and plan for your meetings.
- Keep your committee going year-round to plan campaign activities and provide communication to employees, thanking them and informing them how their dollars are at work in the community.

The most successful campaigns have measurable goals. Work with a United Way representative to analyze the results of last year’s campaign and then set one or more goals based on the strengths and opportunities of prior campaigns. A United Way representative can help you develop strategies to meet your goals.

Sample goals for your campaign:

- Increase contributions to the work of United Way of Cass-Clay.
- Increase participation (the number of employees contributing) and encourage 100% pledge form return.
- Increase average contribution (how much each employee contributes).
- Increase the number of Leaders in Giving (those who contribute $720 or more annually).
  - Individual contributions of $600 are natural prospects for Leadership Giving.
- Increase Emerging Leaders (those who give $300 or more annually).
Looking for a way to quickly grow your campaign? Leadership and Tocqueville Giving are fast ways to help you do that. A United Way Leader in Giving is an individual who contributes $720 or more annually. Tocqueville Society is comprised of individuals, or combined givers, who contribute $10,000 or more annually. We also have a step up program that starts at $5,000.

Ask the CEO or senior leadership to select a manager who gives at a Leadership level to serve as Leadership Chair.

- Set goals for Leadership and Tocqueville giving. Meet with your United Way representative to discuss Leadership and Tocqueville goal setting.
- Make a Leaders in Giving “Ask” in every meeting.
- Include current and potential Leadership Givers from your organization in Leadership Giving “Ask” meetings. Leadership Giving prospects are donors who contribute $600.
- Ask a United Way representative to be present at Leadership Giving meetings, and provide a targeted Leadership Giving presentation.
- Hold a United Way presentation at a managers/directors meeting prior to the campaign. This is an opportunity to ask them to join the Leaders in Giving or Tocqueville Society and support the campaign (work with your United Way representative to identify the appropriate audience for each type of “Ask”).
- Recognize your Leadership and Tocqueville Givers through special events, meetings or other activities. Some companies give out special “Thank You” gifts to Leadership Givers.
- Hold a special event for Tocqueville prospects (donors giving $5000 - $9999) inviting them to give at the Tocqueville level and introducing the Tocqueville Step-Up Program.
- Ask current Tocqueville givers to assist with cultivation of prospects.

**United Way Giving Levels**

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<td><strong>United Way Leader in Giving</strong></td>
<td>Invest $300 or more &amp; join a network of community-minded professionals who connect, build skills &amp; volunteer to gain opportunities to engage with the work of United Way year-round.</td>
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<td><strong>Emerging Leaders</strong></td>
<td>Be a Leader in Giving by investing $720 or more &amp; join the largest investor network - you will improve even more lives, solve complex community issues &amp; create lasting social change.</td>
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<td><strong>Tocqueville Investor Network</strong></td>
<td>Become a Tocqueville Investor &amp; be recognized as a local philanthropic leader who makes an investment of $10,000 or more to make meaningful difference resulting in a better tomorrow for everyone.</td>
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Employee meetings are an ideal way to educate your employees about the work of United Way of Cass-Clay and the importance of each contribution. Individuals who hear about, understand and experience United Way are more likely to get involved and contribute. These meetings should be short, results focused and speak to local success.

- Promote campaign and employee meetings at least one week in advance.
- Invite a United Way representative and/or an Impact Speaker to speak at employee meetings; add them to the agenda of a regularly scheduled staff meeting. No meeting is too early or too late for a representative to attend.
- Speakers will show how dollars stay local, local success, and how small gifts can change lives.
- Be a role model. Make your own donation before asking others to give.
- Use incentives to encourage attendance (e.g. food, giveaways, etc.).
- Decorate the room with United Way posters and table tents.
- Show the campaign video and pass out United Way pledge forms and brochures to all employees.
- Collect pledge forms immediately following the meeting.

1. Get the investor’s undivided attention.
   - Start the discussion on a positive, friendly note.
   - Explain the purpose of your visit.
   - Find out what they know about United Way.

2. Explain the purpose of United Way and why you support it. Focus on one of the Bold Goals.
   - Bring United Way materials and be prepared to explain them. Provide a handout to each person.
   - Share a personal story, success story, or United Way facts.

3. Ask for the investment in the community.
   - With new givers, ask for a first-time gift.
   - For annual givers, encourage an increase.
   - Consider asking for a specific increase, such as $1 more a week or pay period.
   - Remember, you are not asking for yourself; you are asking on behalf of someone who needs help.
   - Offer incentives for turning in a pledge form.
   - All dollars stay local.

4. Answer questions and handle concerns.
   - Know your materials and answer questions honestly – never guess. If you don’t know the answer to a question, let the donor know you will find out and then follow up with a United Way representative.
   - Recognize that some donors have real concerns; people have a right to feel good about their gift.

5. Say thank you.
   - Regardless of what the donor decides, thank them for their time.
   - People like to know their gift is appreciated.
No one organization can solve complex community problems alone. The only way we can create real, long lasting change is by innovating the way people, organizations, and systems work together. Your local United Way of Cass-Clay is changing the way we address issues - by tackling the source, not just the symptoms - and with your help we can solve them for good.

- Talk about four Bold Goals.
- Invite a United Way representative and an Impact Speaker to speak with employees about how United Way of Cass-Clay improves lives in our community.
- Show the United Way Campaign Video at employee meetings.
- Provide incentives to encourage employees to contribute to the work of United Way of Cass-Clay.
- Post United Way’s information on your organization’s intranet or send in an email.
- Find out how your organization’s Corporate Social Responsibility ideas align with the work of United Way of Cass-Clay.
- Ask your organization to provide a corporate contribution to United Way of Cass-Clay.
- Demonstrate to employees how the work of United Way of Cass-Clay helps address what is important to them.
- Create a campaign theme focused on the work of United Way of Cass-Clay.

As your campaign comes to a close, be sure to provide United Way with thorough and accurate pledge information. Work with a United Way representative to account for all pledges. **Report final results to United Way by November 27, 2019.**

**Employee Giving**

- Continuously collect pledge forms throughout the campaign and arrange for your United Way representative to pick up your campaign envelope. Please make sure the front of the campaign envelope is completely filled out. Make sure pledge forms are complete and include names and addresses of all donors so United Way can acknowledge contributions.
- Account for all off-site employees. Follow up with employees returning from maternity leave, vacation, disability, and travel.
- Check in with last year’s donors who have not yet renewed their pledge.
- Remember to include retirees and new hires in your campaign.

**Corporate Giving**

- Collect corporate pledge forms and return to United Way with your campaign envelope.
- It is never too late to match employee contributions.
- If the employee campaign is short of its goal, ask your organization to make up the difference.
- Explore opportunities to support United Way through sponsorships.
It is important to appropriately recognize donors, show them the impact of their contribution on the community and encourage them to stay engaged in the work of United Way.

- Write a “Thank You” message in your organization’s newsletter/email/internal website/intranet
- Plan a “Thank You” event and invite everyone to attend.
- Distribute volunteer opportunities and promote United Way events year-round. Monthly updates are available through the United Way e-newsletter. Register for the newsletter on United Way’s website.
- Send a letter or email from you and your CEO or senior leadership thanking every employee for their contribution.
- Give out “Thank You” pins, buttons, or cards.
- Invite your United Way representative to speak to employees at any time during the year to share success stories and say “Thank You.”
- Volunteer. Work with your United Way representative to organize volunteer projects.
- Organize a tour of an agency to see a community impact program in action.
- Solicit new hires to give year-round and provide United Way of Cass-Clay information to those employees transitioning to other employers or retiring.
- Recognize loyal contributors by asking them to identify the number of years they have been giving to any United Way Campaign and highlight them in your campaign communications.
Bringing in a United Way Speaker will help to illustrate the needs of the community and how the work of United Way of Cass-Clay is making a difference.

Types of speakers available:

- Community speakers that are connected to the work of United Way.
- United Way Staff Speakers – United Way staff are available to speak about our work in the following key focus areas:

1. **Reduce Hunger & Homelessness**
2. **Prepare Children to Succeed**
3. **Help People Be Independent**

How to Request a Speaker

- Contact your United Way representative to discuss your company’s needs and meeting details. Please request speakers at least 2 weeks in advance, if possible. You may also request a speaker by emailing UnitedWay@unitedwaycassclay.org or calling 701.237.5050.
### THEMES

Themes help create excitement and energy for the campaign and are used to help drive results. Examples include:

- Bold Goals
- Live United
- Super Heroes
- Reality TV – Amazing Race, American Idol
- Carnival Theme with Dunk Tanks, etc.
- Driving Results – Car/Race Theme
- Game Show
- Hollywood – Movies, Oscars, Walk of Fame
- Power of Giving
- Sports/Olympics
- Travel/Around the World
- Wild, Wild West
- 60’s, 70’s, 80’s Theme
- Hawaiian – Luau
- See campaign tools on website for more ideas

### “FUN-RAISERS”

“Fun-Raisers” can be used to raise awareness of the campaign and can be held as kick-off or wrap-up events. If your “Fun-Raiser” is intended to solicit contributions make sure to hold the event after your payroll pledge drive.

- Jeans Day – “sell” jeans day coupons for a certain dollar amount
- Bake Sales/Basket Sales/Craft Sales
- Ice Cream Social
- Team/Department Challenges
- Managers Serve Breakfast/Lunch
- Book/Garage Sale – Sell donated books/items
- Car Wash – Sr. Management washes cars
- Cube Decorating Contests
- Dunk the CEO or senior leadership
- Golf Tournaments
- Raffles for donated items
- Silent Auction – Use email to auction off donated items
- United Way T-shirt - order through Office Sign Comany online at FargoStuff.com

### INCENTIVES

Many organizations provide incentives tied to their campaign goals. A large budget is not necessary for incentives – there are many free incentives you can offer to employees for participating in the campaign. These items can also be donated and used in silent auctions.

- Personal Day Off
- Sleep-in/Long Lunch Passes
- Chair Massages
- Jeans/Casual Day Passes
- Covered/Close Parking
- Sports/Show/Movie Tickets
- Company Gear
- Free Lunch Passes
- Weekend at Vacation Home/Unused Time Share
- Lunch with CEO or senior leadership
- Gift Cards – Retail, Gas, Oil Change, etc.
- Organizational Logo Items
The Power of Community. Realized.

Download campaign tools at www.unitedwaycassclay.org/get-involved/coordinate-a-campaign/campaign-tools

For any questions regarding your company’s United Way campaign or your volunteer experience as a United Way Employee Campaign Coordinator please contact:

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To access PDF’s of United Way of Cass-Clay materials, brochures, forms, etc. visit the Campaign Tools section at www.unitedwaycassclay.org

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