

Campaign Planning Handbook

LIVE UNITED



Tulsa Area United Way

United Way's annual fundraising campaign is truly a community-wide effort.

As your organization's Employee Campaign Coordinator (ECC), you are a vital partner in the network of caring and collaboration in our community. Through your work:

You are bringing education to your fellow coworkers.
about available resources in the community!

You are motivating people to get involved!

You are connecting the people and resources to serve
those in need.

You are helping to improve lives and build a stronger
community!

And so much more!

**Thank you for
all that you do.**

What does it mean to LIVE UNITED?

And what does it mean to donate to United Way?

LIVE UNITED is more than a catchy phrase; it's a call to action. LIVE UNITED encourages everyone in our community to come together as one, whether it is giving financially, advocating on behalf of an important community issue, or donating time by volunteering.

GIVE.

When you invest in the community through United Way, you help make positive changes in the lives of people right here.

ADVOCATE.

Choose to LIVE UNITED by speaking up for issues you are passionate about. Champion a cause, tell your friends, write a letter, be visible and engage decision-makers and policy leaders to help address our most important community needs.

VOLUNTEER.

Volunteering is a great way to contribute to the overall well-being of our community. You have the chance to make friends, learn new skills and - most importantly - share your talents and expertise with others. Give whatever time you have. LIVE UNITED by giving back one of the most invaluable gifts - your time.

Collectively, we can help improve the lives of those in need in our community. Together, we can all LIVE UNITED.

Please know how much we appreciate your support and willingness to work on the behalf of your friends and neighbors. Your efforts this year, combined with those of hundreds of others who are coordinating campaigns in their workplaces, will help ensure that United Way-funded services will continue to be available for those in need.

Our staff is available and ready to help in any way possible to make this year's campaign a great success. On behalf of our board of directors, staff and the community at large - thank you! Thank you for choosing to LIVE UNITED. We couldn't do it without you.

Sharing success stories periodically with your coworkers will help educate and motivate them. Check out the videos on our website at www.tauw.org/campaignHQ

STEPS FOR A SUCCESSFUL CAMPAIGN

Planning, Running, Wrapping up

Let United Way help you. We are ready and excited to help you conduct your employee campaign in a number of ways. We can:

- Come and talk to your employees.
- Arrange for an agency representative to talk to your employees.
- Arrange for tours of our partner agencies for your employees.
- Respond to any questions, concerns, or comments that might arise among your employees.
- Provide agency and client success stories.

Meet with your CEO or management team. Make sure all employees know that the United Way campaign is supported by management, all the way to the top. Arrange for the CEO to speak at your campaign's kick-off event. Have your CEO and management sign e-mails and letters that go out to all employees expressing support for the campaign.

Get help! Feedback we have received from ECCs says that assembling a small committee or group to help organize the United Way workplace campaign is **one of the most important** ways to guarantee a more successful fundraising effort. It spreads the labor, contributes to building a team atmosphere, and produces more creativity.

Set goals. Setting ambitious monetary and participation goals is a critical step in raising expectations throughout the organization and at the same time creates a common cause.

Track your goals

One great way to motivate employees is to publicly track your goal.

- ➔ Place United Way goal posters around your workplace - the lobby, break room, in front of the building, etc. Update the posters every day.
- ➔ E-mail goal updates to employees - this can be paired with "United Way Success Stories." (United Way can provide these to you.)
- ➔ Have the CEO or another member of management wear the same tie throughout the campaign - as you get closer to your goal, cut the tie accordingly until, hopefully, it disappears.

Set a schedule. Publicize it, and stick to it. Let everyone know *ahead of time* what events and meetings are planned, when pledges are due, and when totals will be announced. Folks are more likely to turn in their pledge cards when the campaign doesn't drag on so long that the whole thing becomes a distant memory.

Engage employees with agency tours and speakers. It's critical to put a personal face on the partner agencies United Way supports. Inviting partner agency representatives gives your employees a chance to learn more about services in the community, hear success stories first-hand, and ask questions. United Way staff can arrange this for you - just give us a call. Testimonials from employees who have either received assistance or volunteered at the Day of Caring or with an agency are also very helpful when educating people about the importance of giving.

Emphasize giving through payroll deductions. Giving through payroll deduction is the easiest way for most employees to make the biggest impact they can. While special events are a great way to create a festive atmosphere, payroll deductions are the most effective way to give.

If possible personally hand out pledge forms - don't simply put them in with paychecks. Consider personalizing them with a label on each copy.

Motivate employees.

Whether or not we admit it, we all respond to incentives. Knowing that you are "doing good" is nice. Knowing that you are doing good AND have a chance to win an extra vacation day is even nicer. Here are some ways to motivate your employees.

How can you use incentives?

- For a payroll deduction gift
- For a department's percentage increase in giving
- For turning in pledge cards
- For first-time givers
- For attending a department presentation
- For being a leadership giver
- For meeting participation goals

When employees turn in their (completed!) pledge card, they can be automatically eligible to participate in fun activities such as:

- **Football Throwing Contest.** Can be divided into men's and women's groups, management versus labor, etc. Everyone gets two throws. Longest throws win prizes.
- **Pumpkin Throwing Contest.** You will need several pumpkins weighing the same amount, as the thrown pumpkins will probably explode!
- **Balloon Pop.** Employees choose a balloon to pop. Some balloons have "coupons" in them for "snooze" (sleep in) passes, "cruise" (go home early) passes, "two-hour lunch" passes, etc.

- **Fish/Octopus Throwing Contest.** Fish should be dead already! This could also be a reward for meeting your workplace goal - employees get to watch management handle the slippery, stinky fish. Yuck - but fun!
- **Marshmallow/Lemon/etc. Golf.** Who can drive a lemon the farthest? Closest to the pin? On one leg?
- **Frozen Turkey Bowling Contest.** Borrow old pins from a bowling alley, or use 2-liter bottles of pop. Set up an alley in your parking lot or a long hallway and let the games begin!
- **Paper Airplane Flying Contest.** Employees show off their best plane-folding skills. Everyone writes their name on their plane, stands in a line, and lets them fly. Awards for longest flight, shortest flight, etc.
- **Gumball Hocking Contest.** Who can propel a gumball the farthest with their mouth? Don't choke!!
- **Tricycle Races.**
- **Guess the Number of Marbles/Cotton Balls/Bolts in the Jar.** When pledge cards are turned in, employees make a guess. At the end of the campaign, the winner is determined and receives a prize.
- **Prize Drawing.** Line up several prizes (see page 7 for ideas). When pledge cards are turned in, employees draw for a prize.
- **Special prizes for NEW donors.** Consider providing special incentives for those employees who are giving for the first time.
- **Special prizes for donors who increase their gift by a certain percentage.**

Consider the following motivators if your workplace meets or exceeds its goals:

- **Designated employee shaves a member of management's head.** If your workforce meets a "stretch" goal, the CEO gets shaved!
- **Management provides breakfast/pizza party/afternoon BBQ.**
- **CEO/other member of management dress up as ...** Check out costumes at the local costume shop and choose the most outrageous one to promise to your employees.
- **Car wash by management.**

Special Events

The primary purpose of special events is to help create a fun atmosphere during the workplace campaign while raising additional dollars beyond employee pledges. We want this to be a time of year that people look forward to, not dread!!

- **Inter-Company Competition!** - Contact the ECC at another workplace and see if they are willing to engage in a little friendly competition for a good cause! If there are a disparate number of employees, you can use the *average* gift to determine the victor. Publicity and executive support are key to success. The winning company earns early dismissal, or some other workplace-wide reward.
- **Inter-Department/Shift Competition** (see above)
- **Root Beer Floats** can be sold for \$1 in the lunchroom.

- **Sundaes...**
- **Hot dogs...**
- **Theme Days** - 50's, 60's, 70's, etc.
- **Pokes vs. Sooners** - Set up two large change containers - one for the Pokes and one for the Sooners. At the end of your campaign, whichever team has collected the most money wins a day in their honor. Fans and the CEO dress in team regalia.
- **Midnight Breakfast** - If your organization has a third shift, organize a \$3 breakfast to be served by executives who aren't normally at work at that hour! Ask a United Way representative to join you, hand out pledge cards, and announce goals and timelines.
- **Bake Sale** - Bakers can set up shop in the lunch room.
- **Car Wash** - Hold a carwash as a special event.
- **Chili Cook-Off**
- **Group Wellness** - If your workplace is participating in a wellness program, you can incorporate it into the United Way campaign. Collect pledges for every 1000 steps taken or have management pledge a bonus United Way donation if employees meet certain wellness goals.
- **Basket Auction or Silent Auction**- Individual departments can create a themed gift basket (fishing, movies, cooking, car care, etc.) to be auctioned off over a lunch hour.
- **E-Bingo!** - Sell Bingo cards for a small fee. Send e-mails throughout the week with one or two Bingo numbers each time. The first person to get Bingo sends an email to all users. And of course - he or she wins a prize!
- **Caring Company Cookbook** - Ask employees to contribute favorite recipes for a company cookbook which can be compiled and sold in the lunch room.
- **Compliment-O-Gram** - Make up special forms and sell them to office employees as a way to give a compliment to a fellow employee. Charge \$1 per compliment or \$2 if they wish to be anonymous.
- **Halloween pumpkin carving contest** - Charge a nominal fee to enter and vote. Award prizes in categories including best traditional pumpkin, most creative pumpkin, best effort by group or individuals and best entry involving multiple pumpkins.

Prize Ideas - Many businesses in town are happy to contribute small prizes for your employees. Also discuss what funds or incentives are available through your employer.

- Come in late "Snooze" or leave early "Cruise" passes
- Floral bouquet
- Gift certificates/cards - restaurants, salons, gas, oil change, golf, bowling, etc.
- Gift bag
- Lottery tickets
- Fishing gear

- Tickets to athletic event
- Free night at local hotel or Bed and Breakfast
- Car rental
- One full or half vacation/personal day
- Prime parking spot for a week/month
- Casual dress for a week
- Movie tickets
- Share of company stock
- Free popcorn at the movies
- Anything else you can think of that would appeal to your employees

For more ideas on events and best practices, check out the full list on www.tauw.org, Campaign HQ.

For the best campaign utilize employee payroll pledging first, followed by special events for a bit of fun!

Conduct a Leadership-stretch Campaign. Start the campaign off by recognizing the past year’s Leadership Givers. Hold a special lunch/dinner to thank them for their support and ask them to be the first to start the campaign. Challenge them to pave the way by increasing their pledge by two or three percent.

Thank everybody and celebrate your success. Thank everyone, whether or not they chose to give this year.

- Send an e-mail or letter from you or your CEO to all employees to thank them and to report results.
- Hand out candy or other small tokens.

Always finish your campaign with a “Lessons Learned” meeting with your committee. Capturing what went well will improve campaign results year over year!

Employee Campaign Coordinator Wrap up Checklist

- ✓ Please complete campaign by November 1st.
- ✓ Make sure all pledge cards are signed and annual total gift amount is listed on each card.
- ✓ Please don't staple cash or checks to pledge cards.
- ✓ Be sure to separate the pledge cards and give a copy to payroll and put a copy in the provided envelope.
- ✓ If cards are not included, send a spreadsheet with donor information (please include donor name, gift amount, type of gift, email and home address) to campaign@tauw.org (preferred method).
- ✓ Completely fill out the campaign report putting all cash, coins, checks and pledge cards in the appropriate bags/envelopes.
- ✓ If you need help completing the campaign report, contact your account manager or loaned executive.

Contacting United Way

Feel free to contact us at any time with questions, comments, or concerns.

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