Campaign Planning Workbook

YOUR GUIDE TO PLAN, ORGANIZE, AND HOST AN AMAZING UNITED WAY CAMPAIGN.

United Way of Cass-Clay
YOUR IMPORTANT ROLE

EMPLOYEE CAMPAIGN COORDINATOR

Employee Campaign Coordinators (ECCs) are enthusiastic, knowledgeable volunteers who utilize their talents and energy to inspire and rally those around them to give and help their neighbors through United Way.

WHAT UNITED WAY DOES IN 15 SECONDS

United Way of Cass-Clay works to understand and solve our biggest challenges.

By uniting partners, volunteers, and donors we create a better tomorrow for everyone.

YOUR RESOURCE DEVELOPMENT TEAM

We are here to help anytime. Please reach out!

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CAMPAIGN CHECKLIST

BEFORE THE CAMPAIGN
☐ Attend ECC Training
☐ Get your campaign packet
☐ Set a goal for giving and participation with your leadership team
☐ Determine your pledge tool - Paper or ePledge
☐ Create a campaign plan (use this workbook as your guide!)
☐ Create a campaign timeline with action items, dates, and details
☐ Invite your leadership team to play a key role in your campaign
☐ Plan your company’s campaign kickoff meeting and invite United Way to attend
☐ Plan special events
☐ Secure items, experiences, or incentives for giving or reaching your goal
☐ Invite your team to your kickoff at least 2 weeks prior

TIP: Ask for help! Invite your coworkers to help you with the campaign! Being involved in the campaign is a fun way to get to know others and will help you reach your campaign goal.

DURING THE CAMPAIGN
☐ Lead by example and make your United Way investment
☐ Lead your campaign kickoff and campaign events
☐ Distribute paper pledge forms or email your ePledge link; make sure everyone receives the invitation to give
☐ Reach out to team members who have given in the past to personally invite them to give again
☐ Send reminders to your team about the campaign
☐ Communicate with leadership to encourage a corporate gift

DID YOU KNOW: The #1 reason why people give is because they are asked – so don’t forget to make the ask and invite people to join you in making a difference in the community!

TIP: You can turn in checks and cash during your campaign to United Way. Investors appreciate checks being cashed in a timely manner.

AFTER THE CAMPAIGN
☐ Collect paper pledge forms or end online giving
☐ Report final campaign results to your team
☐ Complete your campaign envelope and turn into United Way by Nov. 23
☐ Thank employees that gave and coworkers that helped you with the campaign
☐ Jot down ideas for next year
☐ Don’t forget to engage with United Way year-round!
STEP 1: TAKE INVENTORY OF WHAT YOU KNOW

Consider these questions as you start to plan your campaign:

☐ What is your company culture like?

☐ How do you have fun at work? What activities, events, food, or things do you enjoy doing as a team?

☐ Do you currently volunteer together or raise dollars for the community? How does this work? How do you get your team involved in these activities?

☐ How does your team communicate with each other?

☐ What elements of past campaigns have your employees enjoyed?

☐ What type of campaign is best for your company – in person, virtual, or combination?

☐ Do you need help planning your campaign? Who is your best resource(s)? (United Way is happy to help or maybe it’s others on your team)

☐ What are some possible challenges you might face this year?

☐ What does your company’s calendar look like during campaign season? Are there big events to avoid? Or certain weeks that are high demand?
STEP 2: MAKE A GOAL

Contact United Way for help determining your goals or finding previous year’s campaign results.

Last year’s results: (if applicable)      Campaign goals for this year:
$___________ corporate gift          $___________ corporate gift
$___________ employee giving          $___________ employee giving
$___________ special events           $___________ special events
______ % employee participation      ______ % employee participation
$___________ total raised             $___________ total raised

UNITED WAY VOCABULARY

Corporate Gift: We encourage your company to consider making an investment in our community. A corporate gift gives your employees, your customers, and your neighbors a strong promise that you stand behind providing opportunities for those families and children in poverty.

Employee Giving: Employees that wish to invest in United Way will fill out a pledge form (paper or electronic). Employee giving is all donations made by an employee (payroll, bill me, credit card, check, or cash) to our mission.

Special Events: Fundraising events that raise additional support for United Way.

Employee Participation: # of donors / # of employees. Setting a participation goal is a great way to motivate your team to get involved!

Total Goal: Corporate giving + employee giving + special events. The total financial impact your team is creating in the community.
STEP 3: MAKE A PLAN

Campaign Dates: ________________________ to ________________________
Campaign Theme: __________________________________________________

Pledge Method:

☐ Paper
   Paper pledge forms are filled out by employees and turned in to your Payroll Department. Paper pledge forms need to be turned into United Way using the campaign envelope found in your packet. You can give copies of the forms to payroll, wait for payroll to process before turning into United Way or you can give copies of the pledge forms to United Way.

☐ Easy ePledge
   This is an electronic giving option. To use our platform please contact United Way at least 5 days prior to your campaign start date so we can get your site created and tested.

☐ Other:
   A best practice is to use paper or Easy ePledge giving options. However, some companies use other pledge processing platforms. Make sure you tell United Way what you are using.

Plan your Campaign kickoff:
Date: ________________ Time: ________________
☐ Virtual  ☐ In Person  ☐ Combo

TIP: As you start planning dates, we encourage you to find a consistent way to stay organized. Whether you use your email calendar, an app, or a printed calendar, noting the dates of events, when you are planning communication, and any other key dates will help you make sure you have a great, thoughtful timeline. Not to mention visibility into your plan to make sure your planning comes to life.
Campaign Kickoff Checklist:

- Create a meeting agenda
  
  **Sample agenda**
  
  - Welcome – Leadership team member
  - United Way overview – United Way team member
  - Campaign video – United Way team member
    - ECC to have video set up prior to the meeting
  - Impact Speaker – United Way team member to introduce
    - Highlight a United Way Community Partner to speak during your kickoff
  - Donor spotlight - TBD
    - Invite a coworker to share why they give to United Way!
  - Call to give – United Way team member
  - Campaign information (dates, incentives, events, etc.) – ECC
  - Closing and thank you - ECC

- Invite United Way to speak
  
  Please email Valerie at vmeis@unitedwaycassclay.org to request United Way to attend your kickoff and to request an Impact Speaker. We will come out any time, night, or day.

- Get paper pledge forms ready OR prepare an email with link to give

- Ask leadership to start the meeting and share why the company supports United Way

- Ask a coworker to share why they give to United Way

- Send calendar invite to the team 2 weeks prior to the kickoff

- Reminder emails, as needed: We recommend sending at least 2 reminder emails for your kickoff meeting; one a week before and another the day before. It’s a great way to build anticipation and excitement for your campaign.

**UNITED WAY VOCABULARY**

**Impact Speaker:** A speaker United Way invites from a Community Non-Profit Partner who works directly with people in poverty in our community. They have first-hand experience and can share heartfelt stories about the impact donations make to people in need.
The best way to get people excited to participate in your United Way campaign is to make it fun!

Consider these questions:

☐ What types of events, food, or incentives does your team like? Can you find a way to include those in your plan?

☐ Would your campaign benefit from having ‘fun-raiser’ events? Check out ‘Be a Magnetic Marvel! Campaign Idea Guide’ on the Campaign Tools page!

☐ How many special events should you plan?

☐ If you have a theme, do you want your events or incentives to be connected to that theme?

☐ Remember and include all audiences – in person and virtual. Need virtual engagement ideas? Check out our ‘Engagement in a Virtual World’ guide on the Campaign Tools page!

☐ What are other campaigns doing that you’d like to try?

**TIP:** Be thoughtful about the number of special events you host. You want to create engagement, but too many can overextend the team. Events should be: easy to understand, easy to promote, involve leadership, have a competition component, and, of course, be fun. Planning events can take a lot of time so be mindful of your capacity and ask others to help.

**TIP:** Need a platform to process special event dollars? Contact JoAnn Ohma (johma@unitedwaycassclay.org) to use ours.
**STEP 5: MAKE A COMMUNICATION PLAN**

Thoughtful, consistent communication is a great way to inspire your employees to consider giving to United Way. How often, the channels you use (email, newsletter, flyer), and who sends them is dependent upon your company’s culture and best practices.

Our Campaign Emails document acts as a guide and provides you with some best practices and key messages to get you started.

**STEP 6: MAKE IT HAPPEN**

You’ve done it; you’ve planned a fantastic campaign! Now it’s time to put the plan into action.

**STEP 7: MAKE IT COUNT**

After your campaign, take a few moments to celebrate your accomplishments, thank your team, and plan for next year! Jot down key learns and ideas for next year’s campaign – you can never start planning too early!

**STEP 8: VISIT UNITED WAY**

Don’t forget to turn in all pledge forms and special event dollars to United Way by Nov. 23.
INSPIRATION FROM THE UNITED WAY TEAM

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Being newer to the United Way team, I have realized the power of creativity. When you are planning your campaign don’t be afraid to think outside of the box and get creative! Think of ways that are unique to your company that will excite people to be involved. Encourage your team members to participate by adding a personal touch when talking about it. Go out of your way and ask them in person or over the phone if they would like to participate or give back. This can help involve more people and make them feel special too!

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No matter how our world and workplace changes, one thing that will never change is the desire for people to make a difference. Giving back to the community is a great way for teams to feel connected. Remember that as you are planning your campaign this fall – you are helping people find joy and fulfillment in giving! Therefore, don’t be shy when making “the ask.” BE BOLD. Invite your team to join you, make a difference, and give at a level that is meaningful to them. Share this message in emails, during your kickoff meeting, while you’re walking around the office during campaign season ... keep the energy and invitation to give alive! We hear all the time – “I forgot to give, I didn’t know my campaign was running, I didn’t get the email to give” so be sure you are making the ask and getting the word out. You can do it!

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Remember the power of stories. Your employees want to hear how their donations are making a difference. Whether it’s inviting a United Way speaker to share about how contributions are changing our community, sharing impact stories through emails, or sharing our campaign video with your team. Get the story out there, and the participation will follow.
We have many more great campaign resources to our website – check it out!
unitedwaycassclay.org/tools