

# Campaign Training Handbook



**Caring Rivers United Way**  
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**Welcome to Caring Rivers United Way,  
and Thank You**

Welcome to Caring Rivers United Way. Together we are embarking on a journey that will make a great impact on your community, your company, and yourselves.

Your role as Employee Campaign Chair (ECC) is key to our success. You are our messenger for change—the eyes, the ears and the voice of the community. You are the champion for impact for the future of our service area. Without you we simply could not reach the people you work with and unite those who want to make a difference.

At the same time, we know that as an ECC, taking on the responsibility of your company’s fundraising campaign is work in addition to the job you do each day. We are here to support you with everything you may need to help make your company’s campaign a success. This how-to guide will answer your questions, give step-by-step instructions, provide timelines, and offer creative campaign ideas to help you plan, implement, and have fun!

We cannot thank you enough for your time, talent, and commitment. It is your efforts in the workplace that will directly impact our ability to affect positive change in the community.

With Respect & Thanks,

Joy Nadeau  
Executive Director

Lauri Robinson  
Resource Development Manager

The Caring Rivers United Way Board of Directors

*“By giving to Caring Rivers United Way, a donor’s gift funds multiple solutions to the critical issues facing our community.”*

A note about Caring Rivers United Way (CRUW):

Founded in 1969 by the business community, CRUW embraces the mission to “enhance the organized capacity for people to care for one another.” CRUW is one of approximately 1400 affiliated United Ways nationwide. Each United Way is independent, separately incorporated, and governed by local volunteers.

CRUW serves Big Lake, Elk River, Otsego, Princeton, Santiago and Zimmerman.

### Investing in Caring Rivers United Way enables us to:

- identify the best-performing local health and human service agencies and provide financial support for their work.
- improve the quality of social service programs through assistance.
- mobilize numerous volunteers.
- gather the community to respond productively to the challenges facing our region.
- multiply the impact of individual donations by leveraging them to attract corporate and foundation dollars.

When you invest in CRUW you maximize the only return on your charitable dollar that matters—results. We are working to advance the common good through three community impact areas: Community Basic Needs, Promoting Health and Wellness, and Nurturing Children and Families. Investing in CRUW makes a difference in the community.

### How does it work?

- Contributions are made to Caring Rivers United Way
- Caring Rivers staff and community volunteers study local programs to determine where the money is needed and can do the most good.
- Your gift is combined with the gifts of your friends and colleagues to support needed programs.
- Caring Rivers-funded programs provide service to individuals and families.
- Positive change occurs in people’s lives and as a community we become stronger.



# The Employee Campaign Chair

## Who is the Employee Campaign Chair?

- An individual from a local business, organization or government agency who is designated to coordinate that company's United Way campaign.
- An individual who demonstrates project management, leadership and organization skills
- An individual who strengthens working partnerships and provides an opportunity to forge new partnerships within the organization and with decision-makers outside the company.
- Learns about community needs and the value of Caring Rivers United Way.

## What is your role?

- Meet with your United Way representative to develop a campaign strategy.
- Recruit in-house campaign representatives to coordinate activities.
- Order and prepare supplies for distribution.
- Schedule campaign presentations.
- Arrange for internal publicity.
- Prepare campaign reports.
- Recognize volunteers and donors. (and of course, have fun!)

## Bringing the campaign alive:

- Speakers (Caring Rivers United Way staff, funded agencies)
- Volunteer projects with funded agencies
- Real stories about real people; meet a person who has been helped
- Ask your employees about their personal experiences with United Way-funded agencies. If they will share, have them share their experience, tell the story in a newsletter, post them on bulletin boards or distribute them through e-mail.
- Involve retirees
- Involve new employees
- Use display boards/posters to spotlight the campaign
- Fun activities
- Videos

The more you and your team can connect with Caring Rivers United Way and our work, the more your campaign will grow.

## Running a Successful Campaign

1. *Involve your CEO*; the commitment and involvement of your Chief Executive Officer can significantly improve your campaign. It is a statement that your organization shares a philanthropic commitment to the community. Discuss your company's bigger philanthropic goals with your CEO to show how Caring Rivers United Way can support these initiatives. The goal is to have your CEO:
  - Authorize your campaign plan
  - Set challenging goals
  - Designate time for employee meetings
  - Endorse the campaign through a personal letter or e-mail
  - Approve payroll deductions if not already in place
  - Personally pledge
  - Confirm CEO attendance at kickoff rally meetings, events
2. *Recruit and train a campaign committee* who will help you manage the campaign and communicate with employees about United Way. Recruit from all levels and all company sites:
  - Marketing:* implement communications plan and develop campaign theme, promotions, thank you program
  - HR:* implement a New Hire program for new employees to learn about United Way, in house campaign training, presentations
  - Retirees:* lead effort for company retirees
  - IT:* track progress during campaign and report results
  - Labor:* mobilize members to participate in campaign
  - Payroll:* process deductions accuratelyHave the campaign committee:
  - review the prior campaign and share new ideas
  - attend a United Way campaign training workshop
  - understand and communicate United Way benefits
  - develop a strategy and timetable for reaching fundraising goals
  - specific duties for each member
3. *Recruit campaign representatives*. These are fellow employees who get involved in the campaign and can answer colleagues' questions about United Way. This team of representatives gives broad ownership to the campaign and distributes your workload. On the average, there is 69% higher employee per capita giving than companies not using this technique. Have them attend a United Way orientation to explain their role and review available resources.
4. *Promote and publicize your message*. Education is key.
  - United Way speakers
  - Videos
  - Volunteer projects
  - Displays, posters, photos/video of employees during volunteer project



- E-mail, online schedules, intranet, screen-savers
  - Payroll stuffers
  - Employee testimonials in print or audio-visual presentations
  - In-house employee publications, voicemail announcements
  - Impact thermometers
  - Incentives
5. Hold a kickoff event and employee group meetings. This meeting should be fun! Keep the tone lively, brief, and informative. Hold a question and answer period, encourage questions, thank employees for last year's gifts.
  6. Follow up with employees and report results.
    - Have all pledge forms returned to you, whether or not an individual contributes, so you know that everyone has had an opportunity to pledge; once all the pledge forms are in, the campaign is complete.
    - Make sure forms are filled out properly and total pledge is accurate.
    - Complete the United Way Campaign Report envelope and give it to your United Way Campaign Manager.
  7. Keep them giving. Compare last year's donor list with this year's contributors and determine who has not returned their pledge card. Develop a follow up strategy with non-responders.
  8. Thank everyone, and celebrate success!
    - Thank you posters
    - Issue a thank you letter from the CEO
    - Give a special gift or hold a special reception for your campaign representatives and your campaign committee
    - Publicize your results via the company newsletter, e-mail, voicemail, or memo
  9. Plan next year's campaign!
    - Critique the campaign with your CEO
    - Identify next year's Employee Campaign Chair
    - Implement a New Hires program
    - Implement a year-round communications program that shares the impact of the United Way's work in the community



## Communicating your Campaign

The key to a successful campaign is getting the word out! Repeat your messages several times over the course of the campaign. Remember, getting your CEO on board is a clear signal to employees about the importance of participating in this campaign. Ask each employee to give.

### Technology

**E-mail:** Send e-mails regarding specific events and functions.  
Use calendar options to inform employees about the campaign.  
Send a CEO letter of support via e-mail.  
Use e-mail or voicemail to answer employee questions. Quick follow-up is important!

### Website and Intranet:

Create a company banner ad  
Run a CEO endorsement letter on the website  
Educate employees about online pledging programs  
Include links to CRUW's website on your company website  
Post information about campaign events, progress reports, and results



### Voicemail:

Send voicemail reminders to employees  
Prepare a United Way greeting or thank you message



### Established Communication Methods

- Hold campaign kickoff meetings
- Ensure campaigners communicate directly with their assigned employees
- Use payroll stuffers to inform employees
- Display posters in common areas
- Run a United Way video at group meetings
- Publicize timeframes, incentives, contest winners, campaign results

## Best Ways to Ask Co-Workers to Give

Do you know why most people do not give to the United Way?

They were not asked. Not everyone will be able to attend the special events, so it is important to follow up with employees. It may be awkward to ask fellow employees for money, but focus on how their support will help others and they can feel good about that. When your colleagues understand more about the United Way and how their support impacts their community, they will become more generous.

Quick Tips that make asking easier:

- Know the facts. The more you know about CRUW the easier your job will be. Check out our website at [www.caringrivers.org](http://www.caringrivers.org).
- Make personal contact. People give to people, not to pledge forms left sitting on the desk.
- Be positive. Explain that the benefits of giving include help for people's basic needs, help for children to succeed in life, help for individuals to gain independence and wellness creating stronger families and neighborhoods.
- Call on co-workers you know first. Speaking with people you know will help you to be more comfortable and refine your presentation skills; the positive responses will boost your confidence.
- Be prepared for questions and concerns. People need to know that their money is being used wisely. Review the responses to the "Frequently Asked Questions" section. If someone asks you a question you can't answer, get an answer from your United Way representative and follow up by getting back to the person who asked the question.
- Retrieve all pledge forms and say "Thank You!" Whether or not an employee contributes, pledge forms should be gathered from all employees for record keeping. Thank everyone for their time and gift with a heartfelt message.

### Contributions are Voluntary

The most informed and involved people are the most responsive contributors. An effective communications program, conducted by committed volunteers supported by a well-planned campaign, results in enthusiastic contributors.

- Giving is a personal matter that is confidential.
- Employee giving should not influence personnel decisions.
- A campaign based on 100% participation will create unnecessary pressure; however we do stress that 100% pledge form return is vital.

- The most effective solicitations are those done by peers.
- Any acts of coercion in any form are unacceptable.

### Make the United Way a Year-Round Presence



Campaigning for pledges will be much easier when your employees are exposed to Caring Rivers United Way and its agencies on a year-round basis.

- *Begin a New Hire Program* When new employees are hired, give them the opportunity right away to give through payroll deduction. You don't have to wait until campaign time.
- *Agency Tours and Speakers* Contact the United Way office to arrange a tour or speaker to learn more about a community need and the work of an agency.
- *Volunteer* Contact Caring Rivers United Way for individual and group volunteer opportunities.

\*\*If you have an idea that proved to be successful, let us know about it so we can share it with others!!

**Caring Rivers United Way 763-633-5886**

**THANK YOU FOR YOUR TIME AND EFFORTS. EVERY CAMPAIGN DOES MAKE A DIFFERENCE.**