

## **Job Description: Employee Campaign Coordinator**

Objective: Enable your co-workers to participate in creating the strongest community by planning, organizing and coordinating a successful Callaway County United Way Campaign within your company.

Responsibilities:

- Work closely with the United Way staff to develop an effective campaign plan
- Recruit and coordinate a team of volunteers
- Request Agency Speakers and tours
- Distribute and collect Campaign Materials

## **7 Easy Steps to a Successful Campaign**

### **STEP ONE**

Begin with top management support

The support of top management is essential to a successful campaign.

Here's your checklist:

- Request management to make appearances at kick-offs, rallies and presentations.
- Ask CEO to write a letter endorsing campaign.
- Ask senior management to assist in securing incentives.
- Conduct a management campaign prior to the regular campaign. Encourage participation at Leadership Giving levels.

### **STEP TWO**

Start campaign planning and preparation

The preparation

- Recruit campaign assistance.
- Form your team with representatives across all lines and levels of your organization.
- Assign roles and responsibilities.

The campaign plan

- Call local United Way Coordinator if you have questions or need supplies
- Set a beginning and ending date for your campaign
- Set challenging goals.

### **STEP THREE**

Develop effective campaign materials

Pledge card

- Use United Way pledge cards if possible.
- Utilize giving levels with incentives.

- Promote Leadership Giving.
- Personalize the pledge cards.

#### Video

- Utilize the United Way Campaign video

#### Theme

- Develop a theme to support the campaign.
- Incorporate theme and tag line into customized materials.
- Tie theme into giving levels and incentives.
- Conduct special events and fundraisers around the theme

### **STEP FOUR**

#### Create a strong campaign message

##### Promotion

- Display United Way posters and goal thermometer during the campaign.
- Utilize available resources and technology to promote your campaign activities.
- Promote progress throughout the campaign.

##### Campaign kick-off

- Hold a kick-off event to promote your campaign and increase enthusiasm.
- Be Sure to involve all company locations and employees.

##### Employees presentations

- Schedule all employees for a 15-minute United Way presentation on company time.
- Utilize a United Way representative, agency speaker and video.
- Utilize employee testimonials.
- Pass out pledge forms and make "the ask".

### **STEP FIVE**

#### Make "the Ask"

##### Fundamentals

- Give before you ask.
- Practice "the ask".
- Ask for more, not less.
- Implement a peer-to-peer "ask".
- Strive for 100 percent solicitation.
- Incorporate retiree groups into the campaign and ask for their support.
- Make "the ask" and collect the pledge cards at the end of employee presentations.

- Ensure that all employees turn in a pledge card.

#### Giving guidelines

- Provide employees with a giving guide.
- Encourage payroll deduction
- Create awareness of Leadership Giving for interested employees at all levels.

#### Incentives and competition

- Create friendly competition between departments or other company locations.
- Offer incentives based on timely return of pledge cards, participation and/or specific giving levels.
- Following the employees solicitation, conduct special fund-raising events.

### **STEP SIX**

#### Report results and thank donors

#### Campaign wrap-up

- Tally pledges periodically and provide a mid-campaign report to the local United Way office.
- Conduct make-up presentations to ensure everyone has been asked and returns a pledge card.
- Calculate results to include total dollars, numbers of donors, designations, and Leadership Givers.
- Submit final results to United Way as soon as possible.

#### Appreciation and recognition program

- Hold an event to thank employees and announce results.
- Thank employees in a newsletter and/or a personal letter.
- Distribute incentives.
- Recognize Leadership Givers.
- Give special thanks to campaign volunteers.

#### Follow Up With All Employees And Report Results

- Have all pledge cards returned to you, whether an individual contributes or not. Once all cards have been returned, you'll know your campaign is over!
- Be sure cards are filled out properly and the total pledge is accurate.
- Have your campaign solicitors follow up with their colleagues:
  - Use e-mail and voice mail messages for friendly reminders.
  - Post goal thermometers and keep them up to date.
- Keep daily totals and give progress reports to your team and loaned executive.
- Complete United Way campaign report envelope and give it to your local United Way office Coordinator. Report forms will be delivered with your campaign supplies. Please report the results to your United Way as soon as you have completed your campaign. Also, keep your CEO informed of your campaign progress and the final results.

### **STEP SEVEN**

#### Promote year-round communications

#### Employee education and involvement

- Coordinate a new hires program with the employee orientation process.
- Record campaign activities in the archives.

### ***Your Campaign Can Be Whatever You Want It To Be***

- Traditional: involve your co-workers in interesting presentations about our community while having fun together and building team spirit.
- Wild and Wacky: your imagination sets the limits; Kiss the Pig, Hag in a Bag, and other fun events can really spice up a campaign.

Want to create a unique campaign? Contact your United Way representative. You'll have fun, your co-workers will have fun, and the community will benefit.