

**THANK YOU
FOR ALL YOUR
HARD WORK!**



LIVE UNITED



**HOW TO PLAN A
GREAT WORKPLACE
CAMPAIGN**



STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN

Thank you for joining the United Way of North Central Oklahoma (UWNCO) family by representing your company as the Employee Campaign Coordinator (ECC). The United Way Campaign staff is ready to support you through your campaign! Check out Campaign Resources at <https://www.uwnco.org/campaign-resources> or call us anytime at **580.765.2476**

1. PLAN YOUR CAMPAIGN

MEET with CEO and Recruit your Campaign Committee

- Determine objectives and goals of Campaign.
 - Define incentives for giving levels or participation.
 - Define corporate donation or match amount.
- Determine if the Campaign meetings will be in-person or virtual.
 - Coordinate employee meeting schedule with CEO and/or Campaign Committee.

ESTABLISH a Campaign Timetable

- Set Campaign dates and notify your UWNCO campaign support.
 - Start/End
 - Employee meetings or kickoffs
 - Special events

DETERMINE Options for Employees to Donate

Pledge card | ePledge | Employee giving page

2. RUN YOUR CAMPAIGN ENGAGE

Employees with Nonprofit Partners Tours & Speakers

- Offer tours of our nonprofit partners or schedule a guest speaker from one of them.
 - See firsthand how your money makes an impact.
 - Agency speakers share stories of lives improved by their services.
- To schedule a tour, contact us at info@uwnco.org (please give two weeks notice, if possible).

PROMOTE the Campaign

- Distribute Campaign information in emails and employee publications.
- Use United Way posters, brochures and materials available online at uwnco.org/CampaignHQ.
- Encourage Leadership Giving - an annual gift of \$500 or more
- Publicize the UWNCO website, uwnco.org.
- Educate employees about UWNCO Initiatives

CONDUCT Employee Campaign

- Approximately one to two weeks prior to your employee Campaign, send out the CEO letter (see sample CEO letter at uwnco.org/CampaignHQ).
- Schedule and conduct employee meetings or an all-employee kickoff.
 - See sample meeting agenda.
 - Guest speakers can be from our nonprofit partners, employees who have used agencies, or UWNCO staff.
- Publicize incentives for giving.
- Show the Campaign Video.
- Conduct follow-up with employees to ensure every employee has been given an opportunity to contribute.

How to Conduct a 20-minute Campaign Meeting

| ACTIVITY | RESPONSIBILITY | TIME |
|--|---|--------|
| Distribute pledge cards, instructions on how to give, and other campaign information as employees enter the room | Employee Campaign Coordinator (ECC) or other committee member | 4 min |
| Welcome employees and give the United Way endorsement | CEO | 3 min |
| Introduce and show the United Way video | ECC | 5 min. |
| Have a guest speaker Q & A | UWNCO staff, nonprofit partner, ECC or company rep | 6 min. |
| Ask employees to complete and turn in pledge cards or give a timeline to complete online | ECC or other committee member | 2 min. |

INFORM Employees about Leadership Giving

- Leadership Giving is an annual gift of \$500 or more, exemplifying the spirit that makes our community a great place to live and work.
- Ask your CEO to personally lead an informational briefing or send a letter explaining Leadership Giving (\$500) to all employees before the regular Campaign begins.
- Identify employees whose current giving is close to guideline levels, and encourage them to contribute at the next level, using incentives.
- Recognize last year's Leadership Givers at the beginning of this year's campaign.
- Provide a list of Leadership Givers to your UWNCO campaign account manager or email them to info@uwnco.org.

3. WRAP UP YOUR CAMPAIGN

REPORT Results to the United Way

- Give all original payroll pledge cards or report of gifts to your payroll department.
- Make all checks out to United Way of North Central Oklahoma.
- Do not hold personal checks more than 15 days.
- Email spreadsheet of donors to info@uwnco.org or include copies of payroll pledge cards; ensure all donors also keep a copy.
- Print out the Campaign Report and place in your Campaign Report Return Envelope

**Physically deliver your sealed Campaign Envelope
to our office at 205 N 2nd St.
OR schedule a pick-up by calling 580-765-2476**

Remember to say thank you

- Report final results and thank employees through department meetings, company newsletters and email messages.
- Provide recognition items to all Leadership Giving donors and Loyal Contributors (visit uwnco.org/CampaignHQ).
- Recognize and thank your Campaign Committee and celebrate!
- Evaluate your Campaign results and prepare recommendations for next year's ECC