

# EMPLOYEE CAMPAIGN TRAINING



Sioux Empire United Way

# Employee Campaign Manager (ECM) Job Description

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## Overview:

- Employee Campaign Managers (ECMs), are responsible for leading a company's internal United Way campaign. It is their responsibility to coordinate, publicize, and ensure the success of the employee campaign within their company.

## Benefits to ECM:

- Represent their company and meet other leaders in the community including their Loaned Executive, nonprofit agency representatives, and other volunteers.
- Build relationships with their co-workers in a different and fun capacity.
- Sharpen their leadership, management, organizational, and speaking skills.
- Be a part of the solution and feel good about making their community a better place!

## ECM Responsibilities:

1. Ensure their company has a successful United Way campaign!
  - Attend virtual training, idea sharing, and agency speakers. Even if they have attended in the past, training is a key step to success.
  - Analyze their company's past campaign history & identify opportunities for this year's campaign.
  - Set dollar goals, participation goals, and Heart Club goals.
  - Partner with their Loaned Executive.
  - Recruit an internal committee to help them with the campaign. Successful committees have a representative from all areas/departments of the organization.
  - Create a timeline for the company's campaign. Campaigns typically run in September and October. Determine when the company wants to be completed and work backwards! Set dates for rallies/group meetings and internal events like raffles and special events.
  - Publicize the campaign internally through e-mail, posters, personal notes, intranet, etc.
  - Be the point of contact for United Way questions in their company.
  - Focus on improving their company's employee giving by having fun and trying new things!
2. Strive to complete rallies by **October 31, 2021**. Make every effort to submit the company's totals within two weeks of the company's campaign completion. Results must be to the United Way office by December 31st.
3. HAVE FUN doing something important for their community and feel great about making a difference through their dedication, enthusiasm, and professionalism!

## You are not in this alone!

Support is available to help you at every turn. If you have questions or need assistance, contact your Loaned Executive or Olivia Essig at United Way (605) 336-2095 or [olivia@seuw.org](mailto:olivia@seuw.org).

# Heart Club Coordinator (HCC) Job Description

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## Overview:

- As the Heart Club Coordinator (HCC), you serve as your company's leader in promoting the Heart Club and Rising Heart Club and increasing your company's leadership giving participation.

## Benefits to You:

- Represent your company and meet other leaders in the community including your Loaned Executive, agency representatives, and other volunteers at trainings and events.
- Build relationships with your co-workers in a different and fun capacity.
- Sharpen your leadership, management, organizational, and speaking skills.
- Be a part of the solution and feel good about making your community a better place!

## Your Responsibilities:

- Work alongside your company's Employee Campaign Manager (ECM) to plan and implement a successful Heart Club campaign within your company's regular United Way campaign.
- Attend training. Meet with other companies and brainstorm on new strategies.
- Analyze your company's past Heart Club history and set goals. Set dollar goals and participation goals. Strive to retain all existing members while adding new members.
- Determine the best way to ask individuals to join Heart Club. You can organize a Heart Club event within your company, include Heart Club in every employee rally, or possibly develop a one-on-one ask plan. Make sure every current and potential Heart Club member is personally asked and is given the opportunity to join.
- Educate non-Heart Club members about the Rising Heart option.
- Encourage existing Heart Club members to move up to the next recognition level.
- Thank Heart Club members for their gifts. Provide some sort of internal recognition or incentive.
- Provide the United Way with a complete listing of your company's Heart Club members so we may properly recognize them with a plaque & year bar, and a listing in our Heart Club book.
- Work with United Way staff to identify and follow up on non-renewing Heart Club gifts and retired Heart Club members.

## You are not in this alone!

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# Company Employee Campaign Checklist

Campaign Checklist	Strength	Opportunity
Attend Virtual Training	_____	_____
CEO directly supports/endorsees campaign	_____	_____
Active and trained campaign committee	_____	_____
Goal set	_____	_____
100% contact through rallies	_____	_____
100% pledge card return	_____	_____
Special events and activities for added fun, excitement	_____	_____
Upper management involved in events/rallies	_____	_____
Creatively promote and communicate a campaign	_____	_____
Year-round communication	_____	_____
New Hires Program established	_____	_____
Incentives tied to giving and/or participation	_____	_____
Personalized pledge cards or online giving	_____	_____
Heart Club strategies	_____	_____
Rising Heart utilized	_____	_____
Campaign Committee w/ succession plan	_____	_____
Campaign budget	_____	_____
Show campaign video at rally	_____	_____
Utilize agency speakers	_____	_____
Communicate company's progress throughout campaign	_____	_____
Involve Loaned Executive	_____	_____
Thank donors and committee members	_____	_____
Report final results & celebrate!	_____	_____



# Company SWOT Analysis

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**Company:**

**Employee Campaign Manager:**

**STRENGTHS:**

**WORRIES:**

**OPPORTUNITIES:**

**TRENDS:**

**Relevant Notes:**

**Recommended Strategies:**

# Key Techniques for Campaign Success

Research shows that the #1 reason individuals do not give is because they did not feel they were asked. Sioux Empire United Way measures the correlation between specific campaign techniques and a company's employee giving performance.

These techniques are the foundation of a successful campaign and are directly correlated with high per capita employee giving.

## **ECM attends training sessions**

- ECMs who attend training are more educated about United Way and typically more engaged and more enthusiastic. ECMs better understand their role and are better prepared to take the United Way message back to their employees.

## **ECM organizes a campaign committee**

- No matter a company's size, executing an effective United Way campaign has a lot of moving parts. A committee provides more ideas and creativity, spreads out the campaign responsibilities, and creates additional United Way advocates.

## **United Way rallies are conducted for all employees**

- Educating employees about United Way is essential for increased giving. Rallies typically include showing the video, having a speaker tell a story, information on how to give, challenges or incentives, and an endorsement by the CEO.

## **CEO publically endorses campaign**

- Whether your CEO writes a letter, speaks at the rally, sends an email, or says thank you, employees are more likely to support a cause if they know it is important to leadership.

## **United Way is visible.**

- Let your employees know it's time for the United Way campaign! Hang posters, send emails, and display information on employee portals.

## **Thank you program is in place for all contributors and volunteers.**

- Your campaign is not complete until you have shared the results and shown your appreciation. This may include cookie deliveries, a check presentation, or even a letter signed by the CEO.



# Strategies for Results!

## **IF YOUR COMPANY HAS:**

### Low Participation/High Average Gift

- Design a campaign that encourages everyone to get involved, at any level. Build a committee. Set a participation goal. Make the campaign visual. Provide an incentive for anyone who participates.

### Low Participation/Low Average Gift

- This campaign may be lacking the basics: CEO support, use of the video, fun rally with speaker and food. Do employees understand what United Way is? Make education part of the campaign.

### High Participation/Low Average Gift

- Thank employees for their participation and challenge them to become Heart Club members. Show how giving just a few more dollars a pay period can make a big impact. Use examples. Offer incentives based on increases, like \$1 a week, or for Heart Club.

### High Participation/High Average Gift

- Thank people and provide specific examples of how their gift changes lives. Target Heart Club. Offer a Heart Club incentive. Personalize pledge cards with last year's giving amount.

## **TO IMPROVE PARTICIPATION WITHIN YOUR COMPANY:**

- Build a campaign committee that represents all departments/demographics within your company.
- Set a participation goal. Provide a company-wide incentive if you reach your participation goal.
- Ask everyone to participate! Promote a gift of \$1 per week and what it provides.
- Make the campaign visual with posters and emails.
- Provide incentives for anyone who gives.

## **TO IMPROVE THE AVERAGE GIFT WITHIN YOUR COMPANY:**

- Thank people and give specific examples of the impact of their gift.
- Provide a challenge or an incentive to join Heart Club or to move up a level within the Heart Club.
- Personalize pledge cards with last year's giving amount.
- Set a dollar goal. Communicate the goal throughout the company and provide on-going updates.

# 2022 Campaign Employee & Company Awards

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Every company, regardless of size or number of employees, is eligible for a number of recognition awards.

*Note: If your company qualifies for an award, you will receive it automatically from the United Way office. The printed certificates are ready to frame and hang in your lobby or reception area.*

## **Employee Campaign Recognition Awards**

Any company whose employee giving meets the following criteria will receive a certificate of recognition and thank you.

Excellence Award	—	\$497 average gift and 85% participation
Distinction Award	—	\$390 average gift and 75% participation
Achievement Award	—	\$330 average gift and 64% participation
Appreciation Award		\$284 average gift and 50% participation

*Average gift* is the total dollar amount contributed by employees divided by total number of employees who gave.

*Participation* is the percent of contributors from the total number of employees.

## **Heart Club Awards**

Any donor who gives a leadership gift of \$500 or more will have the option of receiving a wooden plaque as a thank you. They will also receive a Heart Club booklet with their name listed if they choose.

Any donor who gives a minimum gift of \$250 with a plan to increase their pledge by \$1/week over five years to reach \$500 in giving will be recognized at the Rising Heart level. Rising Heart givers will be listed under their company in the Heart Club book and will have the option of receiving a Rising Heart plaque.

Couples may combine their gifts for Rising Heart and Heart Club purposes.

All Heart Club members will receive a form to fill out to request a plaque and to state their preferences as to how they would like their names listed in the Heart Club book.

## **Corporate Heart Club**

Any company who gives a corporate leadership gift of \$2,000 or more will become a member of the Corporate Heart Club and receive a certificate of recognition and a thank you letter.

## **Small Business Heart Club**

This award is given to businesses with 50 or fewer employees who make an annual firm contribution of \$500-\$1,999 (once any businesses gives \$2,000 or more annually, they become part of the Corporate Heart Club.) Small Business Heart Club members receive a certificate of recognition and a thank you letter.

Small businesses who commit to a minimum pledge of \$250 and a plan to increase their pledge over three years to reach \$500 will be recognized as Small Business Heart Club.

*If you have any questions about any of the Awards Programs, contact Sioux Empire United Way at 336-2095.*



# CAMPAIGN INNOVATION

The past year has brought many unexpected changes to workplaces throughout our community. Whether your employees are working remotely, taking on additional responsibilities, or operating in a different capacity; it is still possible to complete a successful employee campaign with new ideas and methods of pledging.

- **No-Contact Pledge Options:**
  - **Online Giving** – a variety of online giving tools for employee campaigns are available, including simple online forms and a secure pledging system.
  - **Fillable Digital Pledge Forms** - PDFs of the traditional pledge form can be emailed to all employees.
- **Video Conference Rally** - United Way staff, volunteers, and/or agency representatives can call in via Zoom, Microsoft Teams, or whatever video conferencing technology you prefer for a campaign rally. This option can be customized to fit your preferred amount of time .
- **Email Campaign** - Communicate whatever options your company is offering for employee giving through email. Provide links to videos, options for pledging, and any special events or activities your company is highlighting for the campaign.

# SPECIAL EVENTS

The United Way Campaign can be a great opportunity to come together, especially after a long year of being apart. Below are some suggestions to get your creativity flowing for some fun and high-energy ways to make the campaign visible, thank employees, and have a blast!

- **United Way Trivia**—work with United Way staff to create a trivia game that employees can participate in each day
- **United Way Agency Tours**—set up company exclusive tours at our funded agencies. Contact [annie@seuw.org](mailto:annie@seuw.org) to facilitate.
- **Grill Out for United Way**—host a BBQ and grill up some burgers and brats for your employees.
- **Corn Hole/Bags**—host a corn hole/bags tournament. Employees can buy in to participate on teams.
- **Cooking Contest**—employees can enter their best salsa/chili/soup/etc. recipe and face off to see who comes out on top!
- **Decorate your Door/Cubicle**—decorate your door/cubicle with a United Way theme. Winner wins a prize!
- **Treasure Hunt**—ECMs hide clues around the office for employees to find in their free time
- **Exercise Challenge**—challenge employees to log their miles and have a contest for who can walk/bike/run the most
- **Hole in One for United Way**—host a golf outing or putting contest for employees

# The Heart Club



The Heart Club is the leadership giving program of Sioux Empire United Way. Any individual/couple who gives \$500 or more is considered a Heart Club member.

The Sioux Empire United Way publishes a Heart Club booklet as a gesture of gratitude to those individuals who have made the investment to change lives through a Heart Club gift. Members also receive a personalized plaque upon their request.

Consider the impact! Giving \$10 a week provides:

- one year of safe, constructive after-school programming for a middle school student
- 333 sack lunches for low-income workers, so they can think about work, not about hunger
- emotionally/behaviorally impaired teens language therapy helping them to follow directions better and increase their chances of staying in school
- 44 hours of free health screening clinics for rural seniors

## Levels of Heart Club:

- Rising Heart (\$250 - \$499)
- Golden Heart (\$500 - \$749)
- Golden Heart Plus (\$750 - \$999)
- Grand Heart (\$1,000 - \$1,499)
- Grand Heart Plus (\$1,500 - \$1,999)

### Heart of a Leader

- Bronze (\$2,000 - \$3,499)
- Silver (\$3,500 - \$4,999)
- Gold (\$5,000 - \$9,999)

### Alexis de Tocqueville Society

- Membres de la Société (\$10,000 - \$24,999)
- Ordre de Liberté (\$25,000 - \$49,999)
- Ordre d'Egalite (\$50,000 - \$74,999)
- Ordre de Fraternite (\$75,000 - \$99,000)
- La Societe Nationale (\$100,000 - \$249,000)

#### Heart Club Awards

Any donor who gives a leadership gift of \$500 or more will have the option of receiving a wooden plaque as a thank you. They will also receive a Heart Club booklet with their name listed if they choose.

#### Gifts from Both Spouses

Couples may combine their gifts to reach a higher level in the Heart Club. Each spouse can request a plaque.

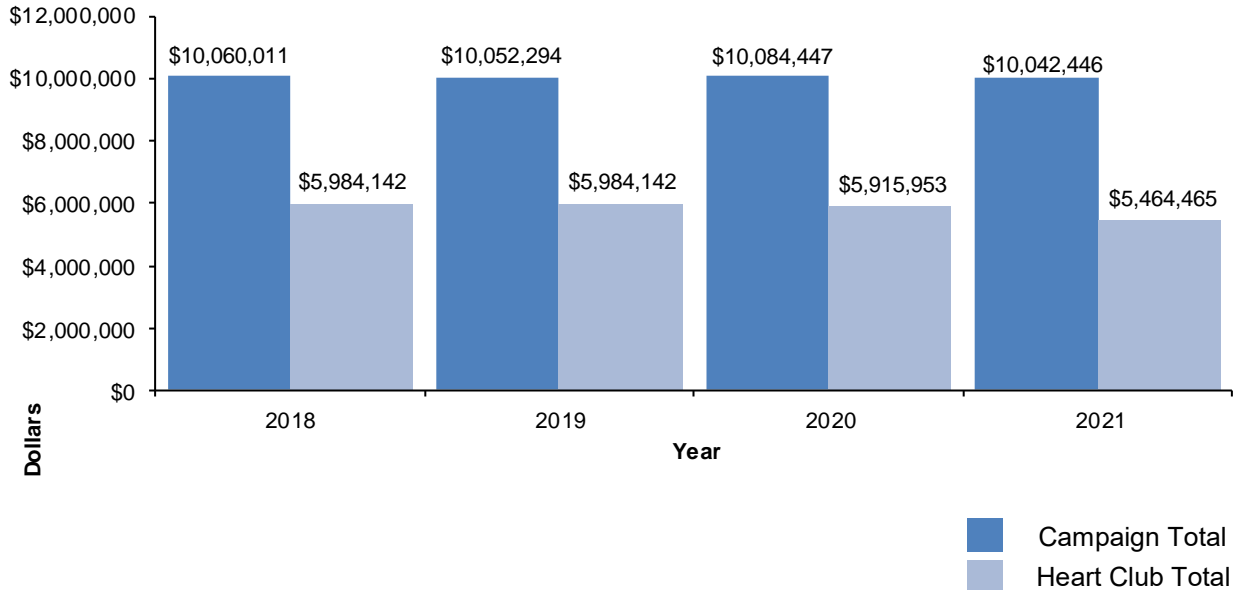
Couples will receive a form to fill out requesting a plaque or year bar, and allowing them to state their preferences as to how they would like their names listed in the Heart Club Book.

# The Impact of Heart Club

In 1984, Herb Bowden led the development of Sioux Empire United Way's Heart Club. 124 members joined that first year, raising \$76,900. Heart Club giving made up 4% of the campaign total.

This past year, Heart Club membership included 6,900 individuals. Together, they contributed \$5,464,465 toward the 2021 Campaign, 54% of all dollars raised. This includes 1,041 individuals who pledged at the Rising Heart level. Rising Heart givers make a minimum pledge of \$5/week with a plan to increase their pledge by \$1/week for five years.

Comparing Overall Campaign Total to Heart Club Total



As a way to better understand why individuals join Heart Club, Sioux Empire United Way surveyed a group of Heart Club members. The Heart Club members ranked the following as their motivations for giving:

1. The dollars stay local.
2. United Way supports a wide range of agencies and programs.
3. United Way programs serve everyone, not just the “down and out.”
4. The efficiency of United Way.
5. United Way can show it is a good investment.
6. More than 24,000 individuals give to United Way every year.



## What is Rising Heart?

Rising Heart is Sioux Empire United Way's introductory level to Heart Club. More than 6,000 individuals belong to the Heart Club by giving \$500 or more to Sioux Empire United Way.

## How do I give at the Rising Heart level?

To qualify for the Rising Heart level, givers make a minimum pledge of \$250 (or \$5/week) with a plan to increase their pledge over five years to \$500 (or \$10/week).

## How are Rising Heart level givers recognized?

Givers who commit to Rising Heart will be recognized as Heart Club members by Sioux Empire United Way. Rising Heart level givers will be listed as such in the Heart Club book under their employer and will have the option to receive a Rising Heart plaque.

## Is this a multi-year pledge?

By indicating to Sioux Empire United Way that you plan to increase your pledge over five years, you are not making a multi-year commitment. Sioux Empire United Way will ask that you continue to pledge your Rising Heart participation each subsequent year.

## How will I know how much to pledge in years two, three, etc?

Sioux Empire United Way will mail Rising Heart givers a letter in the fall with a record of their current pledge and a reminder to consider increasing their pledge to continue their Rising Heart participation.

## Can I combine with my spouse?

Yes! In any increment you wish, you and your spouse can be recognized jointly for a combined gift of more than \$250 or more, with a plan to increase to \$500 over five years. To assure your gift is joined, please share your spouse's name and employer with your company's United Way contact and with the United Way office at 336-2095.

## What if I pledge payroll deduction and change employers?

If you change your employer, you can contact your new payroll office to continue your current pledge. By providing Sioux Empire United Way with your home address or updated employer information, you will receive a letter in the fall with a reminder to consider increasing your current pledge to continue your Rising Heart plan.

## Do I have to wait the full five years to pledge \$500?

Givers can choose to increase their pledge to \$500 at any point during their Rising Heart plan.

## What if I'm already giving more than \$250?

Rising Heart givers can set their own plan to increase their pledge from any point between \$250 to \$499. An example of a different Rising Heart plan could be:

- This year—\$350 (or \$7/week)
- Increase Year 1—\$400 (or \$8/week)
- Increase Year 2—\$450 (or \$9/week)
- Increase Year 3—\$500 (or \$10/week) for full Heart Club membership

## Why should I consider joining the Heart Club?

When you become a Sioux Empire United Way Heart Club member, you join 8,000 individuals who have also made that commitment. As a Heart Club member you have the option to receive a plaque indicating your commitment. You also have the choice to be listed in our Heart Club booklet which is distributed to more than 700 businesses and all current Heart Club members.

# SIoux EMPIRE UNITED WAY

## AGENCY TOURS

Date	Time	Agency Name	Address
Aug. 10th	8:30 a.m.	Ceili Cottage	2300 W 46th St, Sioux Falls, SD 57105
	9:00 a.m.	Active Generations	2300 W 46th St, Sioux Falls, SD 57105
	10:15 a.m.	REACH Literacy	2101 W 41st St Suite 23 Sioux Falls, SD 57105
Aug. 11th	9:00 a.m.	Community Outreach	1915 East 8th Street Sioux Falls, SD 57103
	10:00 a.m.	Boys and Girls Club	2001 E. 8th Street Sioux Falls, SD 57103
	11:00 a.m.	Compass Center	1704 S Cleveland Ave, Sioux Falls, SD 57103
Aug. 16th	2:00 p.m.	Dakotabilities	1116 S. 4th Ave. Sioux Falls, SD 57103
	3:00 p.m.	Kidstop	401 South Spring Ave Sioux Falls, SD 57104
	1:00 p.m.	Furniture Mission	209 N Nesmith Ave, Sioux Falls, SD 57103
Aug. 19th	1:30 p.m.	Tallgrass Recovery and Sober Living Homes	800 West Ave, Sioux Falls, SD 57104
	3:00 p.m.	Children Inn	409 N Western Ave, Sioux Falls, SD 57104
	4:00 p.m.	Helpline Center	1000 N West Ave Sioux Falls, SD 57104
Aug. 24th	8:00 a.m.	Child's Voice	1305 W 18th St, Sioux Falls, SD 57105
	9:00 a.m.	ICAP Heartland House	510 N. Bahnson Ave. Sioux Falls, SD
	10 a.m.	Sioux Falls Area CASA	100 S Spring Ave Suite 140 Sioux Falls, SD
Aug. 25th	9:00 a.m.	EmBe Downtown	300 W 11th St, Sioux Falls, SD 57104
	10:00 a.m.	United Childcare	401 South Spring Ave Sioux Falls, SD 57104
	11:00 a.m.	St. Francis House	210 N Sherman Ave, Sioux Falls, SD 57103
Sept. 7	9:00 a.m.	USD Scottish Rite Children's Clinic	520 S 1st Ave, Sioux Falls, SD 57104
	10:00 a.m.	Here 4 Youth LSS	300 E 6th St Sioux Falls SD 57103
	11:00 a.m.	EmBe's Women's Workforce Programs	620 W 18th St, Sioux Falls, SD 57104
Sept. 9	9:00 a.m.	VOA-Axis 180	1309 W 51st St, Sioux Falls, SD 57105
	10:00 a.m.	SF Hope Coalition	
	11:00 a.m.	Horsepower	26659 Blue Sage Ln #100, Sioux Falls, SD 57106
Sept. 15	1:00 p.m.	Boy Scouts	800 West Ave, Sioux Falls, SD 57104
	3:00 p.m.		
	4:00 p.m.	YMCA	220 S Minnesota Ave, Sioux Falls, SD 57104
Sept. 21	2:00 p.m.		
	3:00 p.m.	Glory House	4000 S West Ave, Sioux Falls, SD 57105
	4:00 p.m.		

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