

# 12 Steps to Success

## Heart Club Coordinator (HCC) Guide

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1. **Attend Training**
2. **Confirm CEO Support**
3. **Recruit a Heart Club Solicitation Team**
4. **Review Last Year's Performance and Set a Goal**
5. **Identify All Current Heart Club Members and Potential Heart Club Prospects**
6. **Consider Soliciting Heart Club Members Prior to the General Campaign if This Works in Your Company's Culture**
7. **Determine How to Approach Potential Members**
8. **Follow Up With Prospects**
9. **Thank Your Contributors**
10. **Report Names and Final Results**
11. **Communicate Year Round**
12. **Have Fun!**

**LIVE UNITED**™



Thank You! Sioux Empire United Way has over 6,700 Heart Club members and you are a part of that success! Without you, many individuals and couples would not understand the needs in our community, and would not know how they can make a difference. A Heart Club campaign is often a part of the general campaign plan for the company. Its purpose is to attract donors who will contribute a minimum of \$500 to the United Way campaign. Heart Club giving is playing more and more of an integral part of the overall campaign in many companies. Many find it easier to ask 10 people to give \$500 than to find 100 people to give \$50.

This Heart Club Coordinator Guide is just that...a guide. You are not expected to incorporate every aspect of every step. The guide is designed to give you a starting place, a new idea or two, a spark! It is important to remember that every company is unique and each campaign should be tailored to the individual company and each individual donor.

## 1. Attend Training

Attending training is critical to your success as a Heart Club Coordinator (HCC). The training will be informative, interactive and motivating. It is also a great way to meet other volunteers doing the same job you are! Even if you have attended before, United Way works to provide new data and resources not available before.

## 2. Confirm CEO Support

Seek the support of the CEO. His/Her participation as a leadership donor will send a message throughout the company that s/he supports the Sioux Empire United Way's mission:

- Ask the CEO to send a personal letter to the management team and other identified individuals showing his/her support of the Heart Club.
- Ask your CEO to institute a corporate match of all Heart Club contributions. Or, have your organization match all new or increased Heart Club contributions.
- Request a budget to provide incentives or a special event specifically for Heart Club donors.
- Request time off as an incentive

### Promote a Combined Gift

Remind employees that they can combine their gift with their spouse's gift to reach the Heart Club level.

## 5. Identify All Current Heart Club Members and Potential Heart Club Prospects

Determine how to solicit based on employee compensation and/or by position within your organization. Consider employees who want to advance within the company and are looking for ways to be seen as a leader. Prepare and personalize each prospect's pledge card.

### RISING HEART

Heart Club can be an option for everyone! With Rising Heart individuals can start at \$250 and set a plan to increase their giving over a 5 year period to achieve Heart Club status.

To learn more visit [www.seuw.org](http://www.seuw.org).

## 6. Solicit Heart Club Members Prior to the General Campaign

- Consider conducting your Heart Club campaign one week before the general campaign.
- Start by having the CEO send a letter of endorsement for the Heart Club to all prospects and current members. This letter can include a personal invite to a Heart Club meeting or special event.
- Announce results at your general campaign kick-off or rally.

### 3. Recruit a Heart Club Solicitation Team

Depending on the size of your company, one person may not be sufficient to adequately manage a Heart Club campaign. Involving others will lead to increased and improved leadership participation.

Consider inviting the senior staff member from each department to the team. Be sure that every committee member is currently a Heart Club giver. Other individuals who make strong team members:

- Current ECM
- Last year's HCC
- A member of management under 30 years old

### 4. Review Last Years Performance and Set a Goal

One key to planning a successful Heart Club campaign is to evaluate past years. Utilize your company's ECM, past HCC or United Way staff to find answers to these questions:

- What was the total number of Heart Club contributions during the last year?  
Last 5 years?
- What was the average Heart Club gift?
- Were there any new Heart Club givers? How many?
- Did anyone move up a level with their Heart Club gift?
- What was the level of CEO or top management involvement?
- Was there a major event?
- How was the Heart Club publicized and promoted?
- What were the best parts of last year's Heart Club campaign?
- What could have been done differently?

\*\* Sioux Empire United Way can provide many of these statistics for you.

Now establish where there could be room for improvements. Set increased dollar goals. Identify an incentive. Consider setting a goal for the number of Heart Club givers. Target new givers from certain departments. Your goals should be a joint decision of the Heart Club Solicitation Team and the CEO.

Publicize your Goals!

Visit the Heart Club Corner at  
[www.seuw.org](http://www.seuw.org)

### 7. Determine How to Approach Potential Heart Club and Rising Heart Members

There are two strategies to consider when planning your approach. One is as a group. The other is through a personal ask. Consider the culture of your workforce and choose the option that best fits.

#### *Group Solicitation*

- Host a Heart Club meeting, possibly a luncheon or breakfast, to introduce the program, to educate Heart Club members and prospects about Sioux Empire United Way and the new initiative, and to thank them for their interest and commitment.
- Invite an Agency Speaker and/or a United Way staff member to attend. United Way has a list of speakers specifically for Heart Club events.
- Show the local video and/or use the Heart Club powerpoint.
- Ask the CEO to welcome the audience and speak of his/her support of United Way and provide a personal story, if possible.
- Distribute Heart Club books, pledge cards and other appropriate information.
- Share your company wide Heart Club goals.
- Introduce the challenge and/or incentive.
- Say Thank You!

#### *Personal Ask*

- Divide the identified prospects and current Heart Club members between your solicitation team.
- Ensure peer-to-peer solicitation and an appropriate match between "solicitor" and "prospect."
- Determine specific dollar amounts to request.
- Distribute a personalized Heart Club pledge card.
- Include a handout highlighting your Heart Club goals and incentives.

### 8. Follow Up with Prospects

- Determine an appropriate follow-up timeline. When do you want to be done? Work backwards.
- Follow up with each assigned colleague until each pledge card is received. Even if the potential member declines to make a gift, it is important to note that s/he was asked and thanked.
- If a potential member declines, share that a gift of any size is meaningful and encourage they give something.
- Use this time to answer any questions. United Way staff is always available if your team does not have the answer.

## 9. Thank Your Contributors

You can never over-thank someone! Here are some ways to show your Heart Club members they are appreciated:

- Send a thank you note to members and to your solicitation team.
- Ask the CEO to send a personal note.
- Personally call each Heart Club member.
- Host a thank you event for the Heart Club members such as a reception, dinner or lunch.
- Have incentives for new donors, renewed donors and donors increasing their gift to a higher level.
- Additionally, Sioux Empire United Way recognizes all Heart Club members who want to be acknowledged.

## 10. Report Names and Final Results

Provide United Way with the names and donation amounts of your Heart Club members in order to acknowledge, recognize and thank them for their generosity and commitment. By providing Sioux Empire United Way the names and contribution amount, you give the contributor the opportunity to be recognized at the appropriate giving level in the community and to be included in the Heart Club Book.

The easiest way to provide the information to the United Way is by using the Employee Summary Report which is an Excel spreadsheet that can be found on our website at [www.seuw.org](http://www.seuw.org). On this spreadsheet you are provided a place to indicate if any Heart Club members are combining with their spouse, have retired, left the company or declined to give a Heart Club gift this year. This eases our tracking and provides a way for you to track your Heart Club members as well.

## 11. Communicate Year Round

Help the Sioux Empire United Way show its Heart Club members how their donation is making a difference throughout the year.

- Invite Heart Club members on agency tours in the spring.
- Encourage Heart Club members to attend United Way's Kickoff in September.
- Post volunteer opportunities in the break room or via email.
- Sign up for United Way's monthly update. Pass it on to the Heart Club members.
- Contact United Way for more ideas!

## 12. Have Fun!

The Heart Club campaign, just like the overall United Way campaign, is a celebration - a celebration of caring. True celebrations are fun and uplifting. They get people excited about being involved. Whether people are giving money, time or both, they should feel good and enjoy what they are doing. And so should you! As the HCC, take time to get to know your fellow employees outside of their typical workday. . .and let them get to know you too!

### Plan a Heart Club Event

- Organize a breakfast or lunch with your CEO hosting the event and personally extending an invitation via email or letter to current Heart Club members and prospects.
- Ask the CEO to welcome the audience and speak of his/her support of United Way and provide a personal story, if possible.
- Allow the HCC or CEO time to inform donors about United Way's accountability standards and company goals.
- Bring in a United Way or agency speaker to demonstrate the impact of a Heart Club gift.
- Encourage dialogue between the speaker and the audience to foster discussion and promote engagement.

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