



United Way
of the Coastal Empire

HOW TO RUN A UNITED WAY WORKPLACE CAMPAIGN

BEST PRACTICES FOR RUNNING A CAMPAIGN

1. CONFIRM LEADERSHIP SUPPORT

- Confirm your leaders' support, ask them how they want to be involved, and discuss goals.
- Set realistic campaign goals and establish a timeline that suits your workflow.
 - Will your company be offering a match?
 - Is your organization inviting retirees to participate with you?
 - Can you include board members, vendors, and customer that aren't yet involved?
- Inquire about a corporate gift.
- Secure a budget for any recognition or activities, ensure time is allocated for campaign-related activities.

2. SELECT A STRONG CAMPAIGN TEAM

- Recruit co-workers to serve on your team; seek representation from all departments and levels.
- Allow the team to set goals for their departments and assist in deciding how best to engage peers.
- Involve overlooked groups: ask a retiree or past leadership giver to serve on the team.
- Consider sustainable practices like 2-year rotations, mentoring processes, volunteer activities, and agency visits.

3. PLAN AND PREPARE

- Provide UW with company information: address, # of employees, leadership name(s), phone, company email.
- Cross-reference and update UW's records with your current employee roster.
- Connect goals with impact; visit uwce.org/campaignhq for success stories and impact data.
- Meet with UW representative to plan the campaign, identify growth areas, and set dates.

4. PROMOTE LEADERSHIP GIVING

- Plan a leadership program.
- Connect with company leadership to recruit a respected senior staff to make individual leadership asks Beacon, Young Leaders, Alexis de Tocqueville.
- Identify prospective leadership donors by targeting:
 - Employees who gave at leadership levels last year.
 - Typically defined as donors of \$500 or more, or those whose annual salary is \$60,000 or more.
- Always remember, YOU aren't asking, the community is.

5. CONDUCT AN EDUCATIONAL CAMPAIGN - EVEN VIRTUALLY

- Kick-off with strength. Schedule a meeting where your UW representative can share the UW story, distribute brochures and pledge forms, and answer any questions.
- (As a bonus, any staff who participates in a UW presentation will be eligible for our prize drawing.)
- Meetings should take place when most employees can attend. Make-up meetings may be offered.
- Coordinate a stand-alone group meeting or add UW to the agenda for a regular team meeting.
- Ask UW representative to invite a Community Fund Advocate or agency speaker to bring another perspective to the presentation.

6. MOTIVATE TO BUILD MOMENTUM

- Make giving manageable. Asking someone to give \$2 per week sounds easier than \$100 per year. Encourage payroll deduction.



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- Promote Caring Club®. Donors who give \$3.50 per week are eligible for discounts at a variety of local businesses (details at uwce.org/caringclub).
- Try something different:
 - Host a special event.
 - Generate enthusiasm and camaraderie.
 - Create a challenge or consider participation awards like casual day, raffle, or time-off.
 - Invite healthy competition among departments to see who raises the most money, has the highest participation rate, or recruits the most volunteers.

7. WRAP-UP AND REPORT RESULTS

- Collect pledge forms and complete the Campaign Report Envelope.
- Schedule a wrap-up meeting with your UW representative; turn in the report envelope with pledge forms and any cash or check donations.
- Share learnings and opportunities for improvement with UW staff.

8. SAY THANK YOU

- Send a letter or email from you and/or your leadership announcing the campaign results and saying thank you.
- Thank everyone for their contributions of time, voice, and money. Remember, just listening to the message can create advocates.
- Celebrate with the whole group and recognize special efforts; consider simple ways to say “thanks” by honoring incentives or hosting an event.

9. CONNECT YEAR-ROUND

- Establish a new hires program for new employees to support United Way.
- Encourage co-workers to subscribe to UWCE’s monthly e-newsletter or add a United Way spotlight to your newsletters and staff meetings.
- Visit uwce.org and find success stories and videos to share; follow UWCE on social media.
- Organize company-wide volunteer opportunities through United Way Volunteers at uwce.org/uwvolunteer.
- Be a champion for our community throughout the year when you give, advocate, and volunteer.

Sample Meeting Format – 20 minutes total

<u>Topic</u>	<u>Presenter</u>	<u>Time</u>
Welcome	Campaign Mgr.	1 minute
Distribute brochures and pledge forms		
How United Way Helps the Community	UW Representative	5 minutes
United Way Success Story / Video		3-4 minutes
Assistance with pledge forms, prize drawing	UW Representative	3 minutes
Leadership Endorsements	Leadership	3 minutes
Questions, thank you, wrap up	UW + Champion	4 minutes



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CAMPAIGN OPTIONS

Our community needs are evolving and so are our campaign options. We rise to the challenge to help then, now, and always. YES, you should have your United Way campaign, and YES we are here to help with THREE EASY OPTIONS.

1. In-person Campaign

- Brochures
- Pledge Forms
- Envelope(s)
- 211 Cards
- Flash Drive with Video Content
- Promotional materials

This option is just like we've always done. We can deliver and pick up materials and envelopes. In-person presentations are an option if you would like them with or without speakers from agency partners but are not required. The most successful campaigns are done in-person.

2. Electronic Campaign - Contactless Campaign. Virtual Campaign.

We provide links to:

- Electronic giving
- Electronic brochures
- Impact videos
- Links to Printable Materials

You guide your colleagues through watch/learn/give steps.

This option is 100% yours to execute however you choose, with our promise of 100% support when you need it. We will not come on-site in order to preserve your safety culture and your work-from-home program. We will educate, coach, and meet virtually in preparation for your BEST CAMPAIGN EVER!

3. Blended Campaign

Pick options from the above two, and let us know two weeks prior to beginning what you want to do. We can provide extra videos, do video conferencing via YOUR chosen platform, or discuss any other options.

MENU OF AVAILABLE MATERIALS

ELECTRONIC:

- Campaign Videos
- Draft email content for you to copy and paste for campaign announcements and results
- Meetings via YOUR chosen online platform, you host and send us a link
- Meetings via OUR chosen platform, we host via Zoom and send you a link
- Social Media banners and frames

You may find more materials at uwce.org/campaignhq

PAPER:

- Brochures



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- Pledge forms
- Campaign thermometer poster
- 211 cards/posters
- Impact posters

WORKPLACE CAMPAIGN TIMELINE

Two Weeks Before Your Meeting

1. Confirm the meeting date, time, and location with your company leadership.
2. Ask your company leadership to speak in support of United Way at your meeting.
3. Email the meeting details to your United Way contact, and ask for a United Way representative to speak at your meeting.
4. Ask leadership to appoint a senior staff member or a leading donor in your organization to speak with other senior staff about donating at a Beacon Society level (\$1,200 or more).
5. Invite all your coworkers to the meeting via email; a sample email is provided by United Way.

One Week Before Your Meeting

1. Send a reminder email to all your coworkers about the upcoming meeting.
2. Check with senior staff on the progress of Beacon Society members.

Week of Meeting

1. Confirm everyone's role in the meeting.
2. Arrive early to have materials prepared and welcome team members as they arrive.
3. Send email to the team to follow up from meeting with giving link and inspiration words.
4. Confirm a targeted campaign closing date.

After

1. Continue communication with your United Way representative to get reporting (if the team is making online pledges).
2. Schedule a time for your United Way representative to pick up the sealed envelope of pledge forms, checks, or cash. The envelope front must be completed with your signature and sealed for either pick-up or drop-off.
3. Send your team a thank you email with campaign results. Encourage your team to engage with United Way on social media.
4. Have a post-campaign gratitude party for everyone who participated.
5. Consider planning a volunteer event with United Way Volunteers.