

**UNITED WAY**

**WORKPLACE CAMPAIGN GUIDE**

United Way of  
the Piedmont



# THANK YOU FOR JOINING THE FIGHT.

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By becoming an Employee Campaign Coordinator for your workplace's United Way of the Piedmont annual campaign, you're taking on our community's toughest challenges. It takes a special person to manage a workplace fundraising campaign: a person with leadership skills, creativity, enthusiasm, and compassion-- a person who believes that together, we can create a community where everyone has the opportunity to thrive.

With your help, we are building a community where every family is self-sufficient, all children have an equal chance at success, and individuals are able to access to the resources they need to be healthy. Thank you for joining us in the fight for long-term stability for every member of our community.

We hope this endeavor makes a difference in your life, as it has for so many others who have taken on this leadership role.

This guidebook is full of ideas and information to help you manage a successful campaign. Remember, your United Way Campaign Manager is just a phone call or email away with additional support and direction.

Thank you for making a real and lasting difference in our community.

Sincerely,

Paige Stephenson  
United Way of the Piedmont  
President & CEO

Amanda Richardson  
United Way of the Piedmont  
Vice President of Resource Development

# BEST PRACTICES

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## **INVOLVE YOUR CEO**

The most successful campaigns have the early and full support of the company's CEO. Ask your CEO to be a visible part of your organization's campaign and send personal correspondence to each employee asking for campaign contribution. Arrange for your CEO to speak at the kickoff and attend activities.

## **SET A CAMPAIGN GOAL**

Review past performance to calculate your goal. Use a targeted percentage increase or a per capita amount when setting your goal.

## **RECRUIT A STRONG CAMPAIGN TEAM**

Recruit team members from all departments, levels, and locations to be part of your campaign committee. A good ratio is one campaign team member per every 25 employees.

## **ASK ALL EMPLOYEES**

Hold campaign meetings with all departments and teams so that everyone can be addressed at one time. Distribute pledge cards (if using) during the meeting and ask for them to be turned in at the end.

## **CONDUCT A LEADERSHIP CAMPAIGN**

Invite management to a separate meeting or event prior to the campaign kickoff to educate and encourage them to consider a leadership level gift (\$1000+).

## **EDUCATE AND ENGAGE EMPLOYEES**

Work with your United Way Campaign Manager to schedule speakers, volunteer projects, and/or tours during your campaign. These experiences allow employees to see firsthand how their donations are being put to work in the community.

## **ESTABLISH A CLEAR CAMPAIGN TIMELINE**

Campaigns are best when kept to two weeks or less. A kickoff clearly marks the start of your United Way campaign and creates a sense of urgency and a timeline. Campaigns with kickoff events are proven to raise more dollars in support of our community!



# CAMPAIGN CHECKLIST



- ✓ **Meet with your United Way Campaign Manager** to plan your campaign.
- ✓ **Obtain CEO endorsement** and support.
- ✓ **Recruit campaign committee** with representatives from all departments.
- ✓ **Set specific goals** for participation, average gift, and leadership giving.
- ✓ **Plan a campaign kickoff** announcement or event.
- ✓ **Schedule employee meetings** and invite your United Way Campaign Manager to speak.
- ✓ **Obtain incentives** that will help you reach your goal.
- ✓ **Determine how pledges will be processed** and reported to United Way throughout your campaign.
- ✓ **Decide how you will thank employees** who gave to United Way through your campaign.
- ✓ **Find out how your employees can engage** with United Way throughout the year.

5 STEPS TO SET YOUR GOAL				
1	Calculate your company's total dollar potential by using one of these two formulas:	A. $.01 \times \text{total payroll}$	=	
		B. $.01 \times \text{average annual salary} \times \text{number of employees}$		
2	Amount raised last year:	\$		
3	Percentage of total potential achieved:			%
4	This year's goal: <i>Suggested: Last year's goal + 7%</i>	\$		
5	Percentage of potential goal:			%

# INCENTIVE AND EVENT TIPS

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Hold a raffle for everyone who participates (prime parking spots, days off, gift cards, etc.). Use the completed pledge form as entrance to the raffle, rather than an additional cost for a ticket.

Offer a casual attire or jeans day to everyone who donates.

If possible, consider hosting events throughout the campaign to promote donation options and have a little fun.

Popular events include dress down days, potluck lunches, silent auctions, and bake sales. Your United Way Campaign Manager can provide you with messaging and talking points for these events.



# ENGAGEMENT DURING THE CAMPAIGN

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**PLAY GAMES.** Daily prizes, trivia, raffles, etc. are a great way to keep employees connected to the campaign. Consider having prizes for teams or departments who reach their goals.

**HOST A VOLUNTEER PROJECT.** Projects give employees perspective on how their gift will be put to work in our community. Volunteer projects with United Way are customized to fit your company's interests and needs.

**CELEBRATE YOUR WINS.** Keep momentum going by celebrating daily wins and keeping the progress of the campaign at the top of all communications.

# SAMPLE CAMPAIGN TIMELINE

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## 8 WEEKS BEFORE CAMPAIGN KICKOFF

- Meet with your United Way Campaign Manager to review past performance and explore campaign themes and materials.
- Develop goals and identify opportunities and challenges to improve on last year's results.
- Determine company pledge entry method: paper forms, online giving portal, or both.
- Determine campaign start and end dates. The most effective campaigns are 1-2 weeks.
- Meet with your CEO or other executive to gain their support for the campaign. Secure a corporate gift or match.
- Review and approve your budget.
- Recruit a campaign team representing key departments and all levels of your company. Educate your team members on United Way's role in the community.

## 6 WEEKS BEFORE CAMPAIGN KICKOFF

- Deliver employee import file to United Way (online giving portal campaigns).
- Finalize goals and strategies with your CEO and campaign team.
- Lay out campaign plan with dates, a theme, events, and incentives.
- Assign tasks to your team.

## 4 WEEKS BEFORE CAMPAIGN KICKOFF

- Notify your United Way Campaign Manager of the campaign materials you will need.
- Begin your Leadership campaign, asking executives at your company to give as an example for the rest of the workplace.
- Schedule engagement experiences and workplace presentations with your United Way Campaign Manager.

## 2 WEEKS BEFORE CAMPAIGN KICKOFF

- Begin publicizing your campaign. Create energy and awareness.
- Prepare your CEO video, email, or letter to your employees.

## 1 WEEK BEFORE CAMPAIGN KICKOFF

- Send CEO video, email, or letter to your employees.
- Review event kickoff with your campaign team.
- Continue publicizing your campaign.
- Make a personal gift to United Way and encourage your team to give too. It's easier to ask if you've already given.

## CAMPAIGN KICKOFF WEEK

- Host your company-wide campaign kickoff event.
- Present information about United Way to all employees in presentations and staff meetings.
- Distribute pledge forms to all employees (for paper pledge campaigns).
- Be available to your campaign team and employees to answer questions.
- Check in with your United Way Campaign Manager about the progress of your campaign and to ask questions.
- Continue building awareness and growing enthusiasm.
- Thank your CEO for his/her support.
- Thank every employee for participating in the campaign.

## POST CAMPAIGN WRAP-UP

- Collect all pledge forms (for paper pledge campaigns). Ask your campaign team to follow up with colleagues who may not have returned their forms. Collecting forms from every individual, regardless of if they gave or not, will confirm that every employee had the opportunity to give.
- Announce your final campaign results.
- Thank every employee for their contribution. Examples: verbal recognition, email, event, etc.
- Conduct a campaign debrief with your team and United Way Campaign Manager. Develop a written summary for next year's campaign.
- Consider additional opportunities with United Way to increase employee engagement.

# KICKOFF MEETING

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**EMPLOYEE KICKOFF MEETINGS** are the most effective way to reach all employees and can take as little as 15 to 20 minutes.

Here are some tips to make the most of your campaign kickoff meeting:

- Start a great campaign by offering incentives to attend.
- Make sure employees know the purpose of the meeting in advance.
- Ask your CEO or other company executive to attend and publicly endorse the campaign.
- Show videos and client success stories.
- Share the company-wide campaign goal, theme, and incentives.
- Keep the meeting lively, informative, and fun.
- Make the ask!
- Thank employees for their participation and follow up with those who were not able to attend.

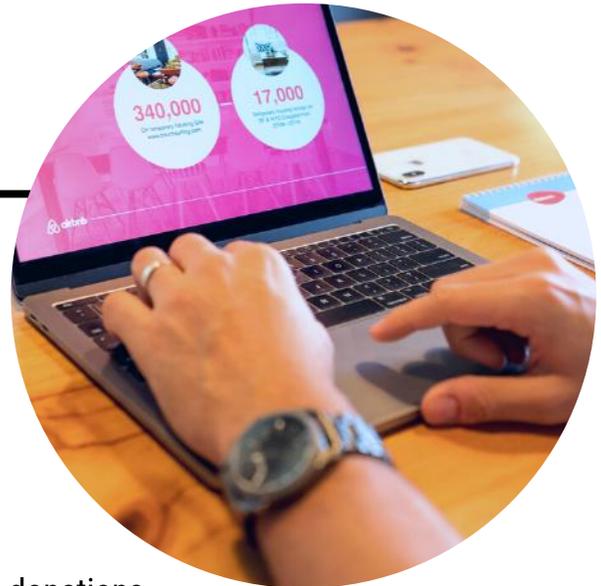


## **SAMPLE SCHEDULE** - 20 minutes

<b>Time</b>	<b>Program</b>
2 mins	Welcome and United Way endorsement by CEO or Senior Manager
5 mins	Share information about United Way of the Piedmont and campaign
5 mins	Speaker or Employee Testimonial
3 mins	Show one or more videos
3 mins	Conduct a question and answer session
2 mins	Ask for the pledge, say thank you, collect pledge cards

# VIRTUAL CAMPAIGN TIPS

*United Way of the Piedmont is ready to help you shift to a virtual campaign. Your United Way Campaign Manager is here to support you and can help you plan and customize your virtual campaign.*



## **ADDITIONS TO YOUR CAMPAIGN TEAM**

Because your campaign will be relying heavily on technology, your committee may also need:

- IT support to help run online meetings and support online donations
- Communications support for social media, email communications, and staff intranet updates
- Virtual event and engagement opportunity leaders to ensure the campaign remains interactive

## **NEW CAMPAIGN MATERIALS**

Think about how you can broadly reach out to all levels of employees, no matter where they're working. Ask your Campaign Manager about:

- Email templates
- Customized online giving platform
- Campaign videos, including a video message from your CEO

## **VIRTUAL KICKOFF**

Just because you can't meet in person doesn't mean your kickoff can't be successful! Kickoffs have many benefits, such as team-building, inspiration, and stage-setting. It is important to consider:

- Choose an online meeting platform that is approved by your workplace. Learn about the platform's functionality. Examples: Zoom, Microsoft Teams, WebEx
- Book your CEO's time so he or she can participate in your virtual kickoff.
- For best results, keep your kickoff to under 30 minutes. If your employee base is large, you may consider hosting a series of kickoffs (e.g. by department) across several days.
- Make your kickoff interactive by utilizing polls or icebreaker questions.
- United Way can provide speakers or videos to inspire giving during the virtual kickoff.
- Let employees know how they can donate and what other opportunities they have to participate during the campaign. Send your donation link immediately following your kickoff event.

## **VIRTUAL ENGAGEMENT**

Virtual events and volunteer activities are a great way to boost employee morale and team-building.

- Examples of virtual events include auctions, raffles, games (BINGO, trivia, etc.), dress up days and dance parties.
- United Way of the Piedmont offers virtual volunteer activities and experiences, such as a poverty simulation. Ask your United Way Campaign Manager about coordinating an experience that fits your company's interests and needs.

# FREQUENTLY ASKED QUESTIONS

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## **Q: HOW LONG SHOULD OUR CAMPAIGN RUN?**

**A:** The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources for both the campaign coordinator and employees. One to two weeks is sufficient to kick off your campaign, get the message out effectively, and make your ask without overburdening staff. An exception could be if you are the campaign coordinator at a very large or multi-site company.

## **Q: HOW CAN WE COLLECT DONATIONS ONLINE?**

**A:** United Way of the Piedmont offers a free online giving platform to collect your employee donations. This platform offers various levels of customization depending on your company's size and needs and can collect payroll deduction, credit card, and e-checks gifts. For more information, or a demonstration of the site, contact your United Way Campaign Manager.

## **Q: ARE DONATIONS TO UNITED WAY TAX-DEDUCTIBLE?**

**A:** Yes. United Way of the Piedmont is a federally registered 501(c)(3) not-for-profit corporation.

## **Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?**

**A:** Your campaign can happen at a time that is best suited for your organization.

## **Q: WHEN DOES PAYROLL DEDUCTION START?**

**A:** Payroll deduction usually runs from January 1 – December 31. However, United Way does not set your payroll schedule; it is a company decision.

## **Q: CAN EMPLOYEES DESIGNATE THEIR DONATION?**

**A:** As a service to donors, we make it possible to specify a non-profit program to receive your donation. However, the direct investment of your dollars designated to United Way of the Piedmont goes further to strengthen education, financial stability, and health—the building blocks of opportunity—in Spartanburg, Cherokee, and Union counties.

# DONOR NETWORKS

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United Way of the Piedmont's Donor Networks are made up of like-minded people who combine their giving, advocacy, and volunteer efforts to help our community now and for generations to come.

## **ALEXIS DE TOQUEVILLE SOCIETY**

*Investments of \$10,000 or more annually*

The AdT Society recognizes local philanthropic leaders whose gifts create large-scale impact in our community.

## **GENERAL DANIEL MORGAN LEADERSHIP SOCIETY**

*Investments of \$1,000 or more annually*

The GDM Society recognizes and celebrates individuals whose confidence in United Way's impact is demonstrated by a leadership level investment.

## **WOMEN UNITED**

*Investments of \$1,000 or more annually*

Women United recognizes, thanks, and further engages women who invest in United Way of the Piedmont and the future of our community. Women United members have opportunities throughout the year to make an impact through giving, advocacy, and volunteerism.

## **AFRICAN AMERICAN LEADERSHIP SOCIETY**

*Investments of \$500 or more annually*

Our newest donor network serves to unite local African American leaders under a banner of philanthropy, volunteerism, and community change.

## **YOUNG LEADERS**

*Investments of \$100 or more annually*

Young Leaders brings together young professionals who strive to use their time, talents, and resources to create lasting change in our community. Young Leaders have year-round opportunities to engage in community impact work through volunteerism and events.



**BECAUSE CHANGE DOESN'T  
HAPPEN ALONE.**



**United Way of  
the Piedmont**

