

United Way
of Jefferson & North Walworth Counties



United Way Jefferson &
North Walworth Counties

2021 Workplace Campaign Manager Planning Guide

Welcome!

September 1, 2021

Dear Workplace Campaign Managers,

Thank you for volunteering to lead the 2021 United Way Campaign at your workplace. Your role as a campaign manager is crucial to the overall success of our United Way's annual campaign, which directly impacts the level of community support we provide. We know how much time and effort you commit to planning, executing, and completing a successful campaign, so please know how grateful we are for your support.

The United Way Campaign can be a major commitment, but also an incredibly rewarding experience. Please take full advantage of all the information, educational tools, and marketing resources available to you that have been specifically designed to help you message United Way to your employees, get your leadership team involved, and ultimately launch and execute a successful workplace campaign and strengthen your company's commitment to community engagement.

Most importantly, please familiarize yourself with the impact that your workplace campaign has for United Way and all that we support within our communities. Each year, approximately 75% of the total funds raised in our annual campaign come directly from our workplace campaigns (employee pledges and corporate support). That means literally $\frac{3}{4}$ of the crucial support we are providing our communities, is a direct result of the hard work of our campaign managers, the giving power of our workplace donors, and the involvement of the company overall.

And this year, we are asking folks to join our efforts to be "United For All." The needs of children, individuals and families within our communities continue to grow and have been compounded by the effects of COVID-19. Our \$270,673 in funding support throughout 2021 is needed for childcare and after school care, for mentorship and literacy instruction, for domestic abuse services and legal advocacy, for mental and dental health care, for sober living activities and access to addiction recovery, for parenting classes and family support, for emergency financial assistance, for our school districts as they plan their fall semester, and so much more.

On behalf of United Way, and all the people we help serve, THANK YOU. Thank you for investing with our organization, thank you for caring about your community, and thank you for helping us continue **to fight for the health, education and financial stability of every person in our communities**. Together, we can create stronger, healthier communities where everyone has an opportunity to thrive!

Sincerely,

Megan

Megan Hartwick
United Way executive director

Nancy

Nancy Alstad
United Way board chair

Steps for a successful workplace campaign

We understand all workplaces run their campaigns differently, and while not all these steps will apply to every workplace, we strongly encourage you to address each of these steps in some capacity, especially if you are a new campaign manager this year.

- 1: Learn About Our United Way
- 2: Thoroughly Review the Campaign Details
- 3: Involve Your Leadership Team
- 4: Recruit a Campaign Committee
- 5: Establish a Goal
- 6: Promote Your Campaign
- 7: Share the Benefits to Donors
- 8: Make It Fun & Rewarding
- 9: Total Your Results & Contact United Way
- 10: Share Your Results & Thank Everyone
- 11: Thank Yourself
- 12: Stay Connected to United Way

Step 1: Learn About Our United Way

Mission: To fight for the health, education and financial stability of every person in our communities.

Vision: To unite people and resources through leadership and collaboration, and build equitable communities where all individuals, and families are healthy, educated and financially stable. To build inclusive communities that Live United.

Core Values:

Leadership & Advocacy, Integrity & Accountability, Inclusivity & Collaboration

Strategic Goals:

Health: UWJNWC is committed to supporting programs and services that help residents of Jefferson & North Walworth Counties enjoy healthy lives.

Education: UWJNWC is dedicated to creating communities where all youth have supportive learning environments and developmentally appropriate opportunities to grow and become responsible adults.

Financial Stability: UWJNWC is focused on ensuring individuals and families have their basic needs met in order to achieve and sustain self-sufficiency.

- ➔ **Refer to your Strategic Plan handout for full details**
- ➔ **Refer to the Annual Report for a full breakdown of last year's campaign success, the support United Way is providing in 2021, and other exciting stats**
- ➔ **Refer to our FAQ sheet (in your "Education" folder) for additional details about our accountability to our donors and our annual grant review process**

Please share this information widely with your leadership teams, department heads, staff members, etc. We want to ensure our donors are as informed about our organization's mission and goals as much as possible. The information also helps draw stronger connections for donors.

A Very Important Note: *Giving will always be a personal choice and we NEVER want anyone to feel coerced into supporting our campaign. We understand there are many reasons someone is unable to financially contribute at any given time. All we ask our campaign managers/teams to do is help educate their employees on the work and importance of United Way. We never want someone to choose to not give based on inaccurate or incomplete information.*

Step 2: Thoroughly Review the Campaign Details

Your campaign folder is full of informative details about United Way and helpful materials to assist you with all areas of your campaign – Education, Promotion, Engagement and Recognition.

Here is what your packet includes and what we hope you'll take the time to fully review and share with your team and staff:

Campaign Videos:

- Top 10 Video
- 10 separate (less than one minute) videos pulled from the full video

Education:

- Annual Report
- Strategic Plan
- FAQ
- Ride United flyers

Promotion:

- Pledge Form
- Email campaign template
- Fundraiser suggestions
- Employee incentive ideas
- Goal template
- Annual report highlight pages
- Partner agency quotes
- Theme images
- Spanish pledge form copy & information sheet

Engagement:

- Season of Caring
- 21 Week Equity Challenge
- Supply drive details
- Volunteermain.com platform

Recognition:

- Social media templates
- Facebook frame
- Press release template

There are also a few documents we provide specific to your workplace:

- 2020 Campaign results (if applicable)
- 2021 Campaign totals cover sheet
- Impact report (from 2020 results)
- Thank You!

Step 3: Involve Your Leadership Team

The level of success of your workplace campaign can depend heavily on the commitment and involvement of your leadership team. If permitted at your workplace, have your leadership:

- Work with you to set a challenging, but attainable, fundraising goal
- Allow company time for employee meetings and/or presentations from United Way staff (*virtual as needed*)
- Endorse the campaign through a personal message sent to all employees
- Allow for the distribution of United Way marketing materials throughout your office
- Approve the option to offer employees payroll deduction pledges (if not already approved)
- Personally pledge a gift
- Confirm a corporate donation or match to employee pledges

Sample CEO/Manager Endorsement Letter

Dear Employee,

(Company name) is very proud to partner with our local United Way in support of their 2021 Campaign. This year's campaign is being run under the theme of "United For All," because we have ALL been impacted by this past year and it will take ALL of us working together to help our communities rebuild and thrive. United Way of Jefferson & North Walworth Counties provides high-level grant support focused on what matters most – the success of our children, the strength of our families, and the health and self-sufficiency of our neighbors and friends.

As we get set to launch this year's United Way campaign at (company name), it is important to recognize that we all can play a part in building stronger, healthier communities. It's also important to note that you can have a positive impact through any level of support. United Way is a trusted partner of our company and provides many benefits to those who choose to support their fundraising efforts:

- *United Way's work supports our company's mission of (insert details about company mission)*
- *United Way's support always stays right here in our communities*
- *United Way allows for a pledge to be made through payroll deduction, which means less direct financial impact on individual donors*
- *United Way provides an option for a donor to designate a donation to a specific organization or initiative they want their dollars to support – allowing donors to invest in something they truly have a passion for*

(Company name) is proud to not only offer this opportunity to our employees to give, but to also give as a company (more details if offering a donation or match).

I know this is a challenging and unique year for all of us, but I hope you will consider participating, at any level that is appropriate for you. Please join me as we help United Way continue to focus on their mission to fight for the health, education and financial stability of every person in our communities.

Sincerely,

CEO/Manager

Step 4: Recruit a Campaign Committee

If your company allows for it, consider building a Campaign Team so the responsibilities of the campaign do not rest solely on your shoulders.

Some suggestions for how to structure that team:

- Include people from different levels of your company
- Include people from different departments
- Assign specific duties that use each team member's skills, talents & interests
- Set a schedule for the campaign and meet often enough to ensure tasks are being accomplished and timelines are on track.
- Recruit people who are passionate about their community and who want to make a difference in the lives of others!

There are many tasks campaign team members can assist with:

- Organize fundraisers or events
- Structure competitions between departments/offices
- Help answer employee questions about the campaign and/or United Way
- Serve as ambassadors who help educate employees on the impact of United Way
- Help distribute campaign materials to employees
- Assist with outreach to retirees for their participation in the campaign
- Serve as "role models" by committing their own pledge early
- Send reminders to employees about deadline dates
- Share their stories about why they personally contribute to the campaign
- Remind employees of other ways to support United Way (beyond a financial pledge)
- Encourage employees to volunteer!
- Help gather, organize and tally campaign totals
- Help distribute thank you's (once provided by United Way)

Building a campaign team to be actively involved can have some great benefits:

- Growth in the campaign (dollars raised, participation, etc.)
- Great experience for young leadership at your company
- A chance for people to work together who don't interact often on day-to-day business
- Opportunity to reach more employees directly
- Exposure to a plethora of community information that some employees may not have previously had
- Shared responsibilities keep everyone's schedules still focused on work

Step 5: Establish a Goal

Determine Your Company's Potential for Giving

It is important to set a goal and then publicize it so your employees can collectively work towards achieving it. You might consider previous year's campaign results (for those who held a campaign last year) when setting your 2021 goal, while certainly accounting for any relevant changes at your company because of COVID. To access that information, refer to the "Past Campaign Totals" document that was included in your campaign folder.

Year	# of Donors	% Participation	Amount Raised

Other important figures to consider (both of which are provided on your report)

- Average gift per employee
- Percent change in campaign from previous year

**Goals can be set for participation and/or amount raised,
and should be challenging but attainable!**

It is also important to think about:

- Any changes in your business/economic factors
- COVID impacts on your business and/or employees
- Number of retirees from previous campaign who used to donate
- Any new hires (do they know about United Way?)

Our 2021 United Way Campaign Goal:

Percent Participation Goal: _____

Fundraising Goal: _____

Percent increase from previous campaign: _____

Consider using the Goal Template (or similar graphic) provided in your campaign folder to visually track the progress towards your goals. We can make any updates to it that you'd like. Make sure it is located somewhere your employees can see it and hopefully get motivated to give!

You can also consider keeping your employees updated throughout the campaign on their progress towards achieving the campaign goal(s).

Step 6: Promote Your Campaign

For your campaign to be successful, your employees will need information about it! Promoting the details of your campaign and sharing information about United Way, provides the best opportunity for your campaign to produce successful fundraising results.

In addition to the CEO/manager sample letter included in this packet, your campaign folder includes many helpful marketing materials to utilize in your promotional efforts.

Suggestions of items to use & ways they can be used (virtual options as applicable):

- Hang the United Way posters around your office
 - VIRTUALLY: upload a pdf copy to your intranet, include the image in a newsletter or email announcing the campaign

- Post your company's campaign goal in a prominent location where all employees will have a chance to see it (a goal thermometer has been provided in your packet)
 - VIRTUALLY: post the goal on your company's intranet or share in an employee newsletter or other communications

- Share the pledge forms with every employee (details of our support are on the back page)
 - Personalize the pledge forms with employee names if possible (using the fillable form)
 - Attach any information related to incentives your company might be offering
 - VIRTUALLY: share the fillable pledge forms, utilize an internal site for employees to donate

- Hang flyers promoting any events/fundraisers your company will be holding during the campaign (can be created by United Way upon request)
 - VIRTUALLY: share the details in emails or on screensavers announcing the fundraisers

- Post to your company Facebook page announcing your campaign
 - Share your company's goal
 - Share testimonials from employees about why they choose to give
 - Share why your company supports United Way and why you are "United For All"

- Hold company/department meetings to share information about United Way
 - Have pledge forms available (use fillable form if holding meetings virtually)
 - Include United Way staff, if possible
 - Offer an "early bird" incentive if people make a pledge on kickoff day
 - VIRTUALLY: host the meetings over Zoom, Skype or another online option

- Share the annual report, strategic plan, and videos with staff in any form available

- Remind employees to visit the United Way website or Facebook page for more information
 - www.uwjnwc.com
 - FB: @uwjnwc

- Share partner agency quotes often!

If any additional materials are needed, please contact Megan Hartwick directly at 920.563.8880 or unitedway@idcnet.com.

Step 7: Share the Benefits to Donors

As mentioned earlier, we never want a donor to feel pressured into giving. But we do want potential donors to be educated about United Way and understand the benefits and impact they can have by contributing to the campaign. 😊

Please share this information with your staff before they make their decision about whether to contribute to the campaign efforts. Our campaign video also does a great job highlighting some of these benefits:

Campaign Video: <https://www.youtube.com/watch?v=mNwIHp9EWvM>

- ✓ **Every donation to United Way is tax-deductible**
- ✓ **All donations & support stay LOCAL**
- ✓ **Donors can choose to donate through payroll deduction**
- ✓ **Donors can designate where they want their support to go**
- ✓ **Annual review process ensures accountability of funds distributed**
- ✓ **Support can be given beyond a financial contribution**
- ✓ **Donations directly impact and improve your community!**

Step 8: Make It Fun & Rewarding!

The United Way Campaign should be fun! 😊

We want campaign managers and employees to be excited about their company's participation in the campaign – and competition, incentives and new ideas are always a great way to generate excitement.

A “Fundraisers” sheet and “Employee Incentives” ideas list have been provided in your campaign folder, with some reminders and additional suggestions given below:

- VOLUNTEER DAY with staff
 - Coordinate some volunteering time for your staff through United Way – there are still some options even while social distancing
- Encourage staff participate in the Season of Caring
 - Promote the week and encourage participation widely throughout your company
 - Share participation on your company's FB page
- Set a Campaign Theme that will resonate with your staff or actively promote our campaign theme of “United For All”
- Hold a post-campaign celebration with CEO/manager/department heads if the company meets their goal

Step 9: Total Your Results & Contact United Way

We will be so eager to receive your campaign updates and final details!

Enclosed in your campaign folder, is a “campaign totals” form that we ask all campaign managers to complete prior to handing over any materials to United Way. These totals help ensure that we have received all pledge forms/money/company donation information/etc.

If our staff comes up with a total different than what is listed, we will contact you directly to determine where the discrepancy occurred.

Important details to keep in mind while organizing all of your campaign information:

- Ensure that EVERY payroll deduction pledge form contains the donor’s signature (we cannot legally process one without a signature and will have to get it back to you to obtain the signature)
- Please tally the pledges as indicated on the form:
 - Number of payroll pledges and total
 - Number of cash/check pledges and total
 - Number of credit card pledges and total
- Note any funds raised from other fundraisers/events on the right side of the form
- Please keep any cash/checks related to fundraisers **separate** from cash/checks associated with a pledge form donation
- Provide any details regarding where a corporate thank you should be sent and who it should be sent to (if your company provides a donation and/or match)
- If you have payroll deduction pledges that will be paid out to United Way, please be sure to note how often those payments will be made

Once your information has been checked and totaled, please place everything in the provided campaign envelope and contact our United Way office to arrange a pick-up time.

We would also appreciate if in coordination with the packet pick-up, that we could have a photo taken to thank and promote your company’s participation and support! To keep everyone safe, we would ask this be done with masks and social distancing. Otherwise, please feel free to take a picture of your team with your final packet/donation and send that our way. We simply want to promote the generous efforts of our corporate supporters as much as we can!

Step 10: Share Your Results & Thank Everyone

It is important that employees feel recognized and appreciated for the contributions they are making during the campaign and that they know how the company did overall in reaching its goal!

United Way will provide thank you's to every single donor from your company's campaign (either a letter or postcard). Those will be dropped off to you no later than mid-January.

We highly suggest finding a fun and impactful way to share your fundraising results with your team once the campaign is completed and thank them for their contributions. Here are some examples/suggestions:

- Hang up a big banner in your office sharing your results
- Purchase number balloons to show-off the total amount raised (i.e. a "5" and three "0" balloons to highlight raising \$5,000)
- Send a thank you note from the CEO/manager to all employees for their support
- Plan a special post-campaign celebration for reaching goal
 - Announce a "winning" team/department and congratulate them
 - These celebrations can be done virtually if necessary!
- Distribute incentives to any employee who earned them
 - Pick the winners of the big incentives
- Send a special thank you to your campaign team members
- Schedule a photo-op with United Way to distribute to the local newspaper
- Send in a press release announcing your company's support for United Way
- Share campaign updates on your social media pages and thank your staff for their support
- Write a recap article to share in a company newsletter
- Share any exciting updates/announcements with United Way so that our organization can share them our donor-base as well!

Please use the "Post-Campaign" email template provided in your campaign folder to help you structure your follow-details to share!

Step 11: Thank Yourself!

We know our annual campaigns are a lot of work, and we know our United Way would NEVER be able to make an impact the way we do in our communities without the incredible support of the campaign managers at the workplaces that support us.

Please know how incredibly grateful we are for your time, energy, creativity, and support!

Your effort truly makes a huge difference in the lives of so many people and organizations in our communities. We want to make sure you don't underestimate the value of that.

You are so very valued and so very appreciated!

We look forward to publicly thanking you on our Facebook page and in our newsletters. Please reach out to our office if you DO NOT want to be specifically named and recognized.

Now THANK YOURSELF and know that we won't bother you again for a year. 😊

Step 12: Stay Connected to United Way

We want our donors and supporters to feel connected to us all throughout the year, not simply when we are actively fundraising during the fall campaign.

We want our community members to stay updated on how we are using their generous donations, how the needs of our communities are changing, and how we can all continue to work together to create stronger, healthier communities where everyone thrives!

Let us serve as a resource for you and your company throughout the year:

- Encourage employees to provide their email address on their pledge form to receive our email newsletters (ONLY place that email is used)
- Visit our volunteer platform – www.volunteermain.com – to find ways to get involved with our partner agencies and other local organizations
 - Register yourself so the site can automatically notify you of new volunteer needs
 - Share the information with your staff and encourage them to register
- “Like” our Facebook page to see updates about our partner agencies, community projects, upcoming events, etc.
 - Share our posts and invite others to “like” our page
- Inquire about serving on our board of directors or a board committee
- Volunteer at our annual Chili Cook-off or other fundraisers we host throughout the year
- Participate in our annual agency application review process as one of our crucial community volunteer team members
- Reach out anytime your company is looking to set-up volunteer activities, wants to provide community educational information to the staff, or is looking for ways to expand upon its community engagement efforts
- Email or call us anytime with any questions, suggestions, or overall feedback

→ Please consider also utilizing these details to share with retirees and as part of your onboarding process with new employees!

**THANK YOU again for your commitment to United Way.
We truly value your involvement and your commitment to
our organization and our communities.**

Here’s to a successful 2021 Campaign!