

Employee Campaign Manager WORKPLACE CAMPAIGN GUIDE



Campaign Checklist

Before the Campaign

- Meet with your United Way Representative and develop a written campaign plan
- Obtain CEO endorsement and support - ask for corporate matching
- Recruit a campaign committee to help you with the campaign
- Review campaign history and set your goals
- Determine your campaign plan, timeframe and incentives
- Gather your campaign materials (brochures, pledge cards, video and posters)
- Schedule your kickoff, any guest speakers and special activities

During the Campaign

- Distribute pledge forms (*if paper*) and campaign materials to everyone
- Promote the campaign through various channels
- Send reminders about campaign events and deadlines
- Follow up with individuals who have yet to turn in their pledge forms or visit your campaign website

After the Campaign

- Collect all pledge forms (*if paper*) or pull reports from your campaign website
- Schedule a time with your United Way Rep to complete the paperwork and reporting
- Verify any corporate contributions or matches of employee giving
- Send a thank you letter to everyone on your committee
- Publish a short story, photo and results of your campaign

Year-Round

- Keep employees updated on United Way activities
- Promote volunteer opportunities to employees

Campaign Steps

United Way of Brevard provides the assistance and resources you'll need to maximize your company's campaign success. As you begin preparing:

- Contact United Way! Our staff is here to help.
- Visit our website at www.uwbrevard.org for ideas including the ECM Toolkit. All of our campaign materials can be found on the ECM Toolkit at the bottom of the home page. You'll find logos, success stories, videos and other marketing materials.
- Also, stay connected through Facebook and Instagram to see what we are doing!

1. Confirm Top Management Support

- Gain approval for recruiting your committee and holding meetings and activities on company time.
- Ask for visible support from company leadership.
- Discuss options for engaging senior staff through a focused leadership campaign.
- Discuss incentives to encourage participation and increase giving.

2. Recruit a Campaign Committee

- Recruit a diverse team that includes people from different departments and levels.
- Set a schedule of committee meetings and distribute to members.

3. Develop a Campaign Plan

- Invite your UW representative to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within your culture.
- Determine the means of pledging best suited to your company: preprint your pledge forms from United Way, adhere labels to blank forms, or use online giving. Work with your UW Rep to deliver your campaign materials.
- Determine a campaign timeline including the pledging, presentations and activities.
- Outline campaign activities and determine which team members will be responsible for implementing, including organizing the campaign kickoff, distributing and collecting pledge forms, planning special events, securing incentives, etc.
- Evaluate past results and identify areas where potential for increases may exist - dollars raised, participation, etc. - and set a campaign goal that focuses on these areas.

4. Implement the Campaign Plan

- Promote the Campaign. Place information (*available on the ECM Toolkit*) in high traffic areas around your office or share via email or your social channels so employees can learn about United Way.
- Hold a Campaign Kickoff. **Start the campaign with your company's leadership team prior to the general kickoff.**

Campaign Steps

- Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, timeframe, activities and incentives.
- Invite a member of the leadership team to the general kickoff meeting(s) to communicate management support of the campaign.
- Invite your United Way representative to speak at the meeting(s).

★ Make the Ask ★

- Make sure that everyone is given the opportunity to make a contribution to the campaign. Use the campaign kickoff, department meetings and one-on-one conversations to encourage participation. One of the biggest reasons people say they didn't give is because they weren't asked!
- Personally distribute and collect pledge forms. Ask everyone to return their pledge form, even if they choose not to give. Your coworkers are most likely to give/make a decision immediately after being asked, so try to collect the forms right away.
- Collect all forms even from those not giving so you know everyone's had the opportunity.

Monitor and Report Progress

- Send out reminders to encourage people to turn in their pledges.
- Keep a running total of dollars raised.
- Provide regular updates to employees - send out email blasts and success stories.
(See *ECM Toolkit* for examples)

- Make personal follow-ups with individuals who have not turned in their pledge as the campaign nears the end.

Wrap-Up the Campaign

- Ensure all pledges are turned in. Collect payment for those who opted to make a one-time gift with a check or cash.
- Schedule a meeting with your United Way representative to finalize the campaign - pick up the campaign envelope, unused campaign supplies, etc.
- Report your final campaign results to employees and leadership. Celebrate your success!
- Thank everyone! Send thank you emails, ask the CEO for a thank you message to communicate to employees, hang thank you posters. And don't forget to thank the committee for all their help!
- Hold a final campaign committee meeting to evaluate your efforts and make recommendations for next year.

5. Year-Round Engagement

- Follow us on Facebook and Instagram to see fun photos, be invited to events and find other opportunities to get involved.
- Share United Way updates and news with employees on a regular basis throughout the year so they can see the impact of their contributions.

Making the most of your meeting!

Sample 12 Minute Agenda for your United Way Employee Meeting

Item	Presenter	Time
Welcome, corporate support of Campaign	ECM	1 min.
CEO endorsement and personal support	CEO/Senior Manager	2 min.
United Way overview	United Way representative	3 mins.
Campaign video and/or success story	ECM or UW Rep	3 mins.
Ask for the Gift	ECM or UW Rep	2 mins.
Thank, collect pledge forms or encourage gifts online	ECM	1 min.

Make your Campaign Fun!

Create a fun atmosphere with Decor

- United Way posters/backgrounds
- United Way balloons
- Large screen or TV to show video
- Share flyers showing how donations are used



Jeans for a cause

The universally popular dress down day can be a fundraiser too! Employees pay to wear jeans. We have stickers available to show everyone they are wearing jeans for United Way.

Candy Grams

We have some creative candy gram ideas you can make to give to employees as a thank you for participating.

Use Prizes and Incentives!

It doesn't take a lot of money to offer great prizes and reward employees for participating in campaign events. Not every prize has to be big or expensive!

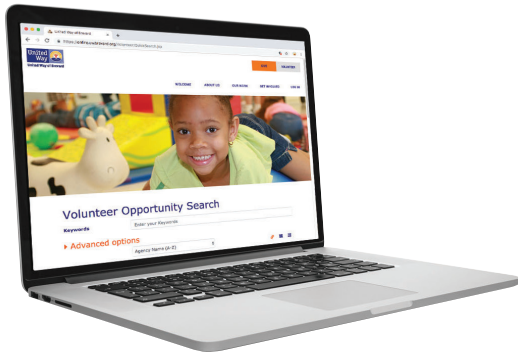
- Paid time off
- Sleep in late or "Flee @ 3" coupons
- Prime parking spaces
- Gift certificates
- Coffee served each morning for a week
- Pizza Party
- Corporate logo clothing

List something you would like to try in your workplace or cool ideas you saw another ECM try:

Getting the most out of your Campaign

ePledge - Make the switch to Online

It Increases employee giving!



ePledge is an efficient, secure, green and easy to use online internet based giving tool. Employees can make pledges online eliminating the need to distribute, collect or process paper pledge forms. Campaign leaders can monitor your campaign in real-time. On average, organizations that have switched to ePledge experienced a 5% increase in employee participation and nearly a \$2,500 increase in overall employee giving!

Features and Benefits

- Secure, online interface with United Way and your organization's systems (SSO available)
- User-friendly screens and flow
- Supports multiple giving methods (e.g. payroll deduction, credit card, cash, check, PTO, etc.)
- Branded messaging and organizational customization opportunities
- Donor designation options for qualified 501(c)(3) health and human services organizations
- Allows employees a secure and private way to make their personal charitable giving decisions
- Real-time reporting and monitoring
- Export file available to download and upload directly into your organization's payroll system eliminating time spent entering deduction information
- Reduces or eliminates the need for paper forms, saving time, paper, resources and the environment

Ready to make the switch to an ePledge Campaign? We are here to help. Please contact: Your United Way representative at 321.631.2740.

Education

Serve on a Community Impact Panel



Serving on an allocations panel is an eye-opening experience, providing the opportunity to see firsthand the incredible impact nonprofit organizations have in our community. Panels review funding requests, assess the organizations' effectiveness, financial health, and alignment with United Way's priorities. Consider allowing team members who have served to share insights with co-workers about the transformative work.

Incentives, Food and Fun

Consider a budget for your campaign team. Collect prizes from local restaurants and businesses to use as incentives. Encourage your team to make it fun.



Lotane & Associates had a delicious breakfast as part of their campaign thanks to Meg O'Malleys and Chef Eric who donated the food. The Lotane kick off included guest speakers from United Way of Brevard and Serene Harbor which inspired the team to donate! On the very first day, 55.1% of the team had made their pledge!

Getting the most out of your Campaign

Inspiration

Telling the Story in Group Meetings

Group meetings result in better participation. Simply sending an email or putting a pledge card in someone's mailbox doesn't work. Give your team an opportunity to see how our United Way is changing lives and strengthening our community. Don't forget to invite your UW rep.



Tours/Agency Speakers

Getting out of the office and learning about the needs in our community is a powerful way to show your employees how their gifts are making an impact. If you can't spare the time to get out of the office, consider bringing in a guest speaker. Hearing first-hand from someone who has been helped inspires giving.

Make Sure to Say Thank You

It's important to stop and take a moment to celebrate your accomplishment and thank your employees for their generosity.



Publix Super Markets hosts a day of thanks and celebration for its associates including cookouts and cake.

Special Events

Consider implementing a special event like a 5K race or golf tournament to increase your campaign.

Races and Walks



Kennedy Space Center Visitor Complex hosts their Annual Space Race to benefit United Way.

Golf Tournaments



Space Coast Credit Union added a final push to the campaign and hosted a United Way Golf Tournament at Duran Golf Club. The tournament was a hole-in-one success! Community members gathered, and were swinging their clubs in support of the incredible work done by United Way of Brevard. It was a fantastic day filled with friendly competition, networking opportunities, and most importantly, making a positive impact in our community. We are grateful to SCCU and all our golfers for their support!

Leadership Giving Efforts

Leadership giving is another strategy to grow your campaign. Throughout the year, Leadership donors are invited to participate in a variety of social and recognition activities, which build loyalty and can increase giving in future campaigns.

Leadership Giving Levels and Opportunities

Chairman's Club
\$500-\$999

Torch Society
\$1,000 - \$9,999
(*Crystal, Bronze, Silver, Gold and Platinum*)

Tocqueville Society
\$10,000 and up

Why be a leadership giver?

- Recognition in the leadership book
- Increased connection - special communication and invitations to events
- Inspiration: your generosity just might inspire someone else to give

Questions to consider:

- Does 50% of your employee giving come from leadership giving? If not, leadership giving is an area of opportunity.
- How does your company rank among peers in your industry?
- Are you making a special appeal to attract contributors at different levels?

Host a special Leadership "Ask"

- Lead by example - secure leadership gifts early to provide inspiration.
- Ask current leadership donors to consider increasing their gift.
- The CEO should be present at the Leadership kickoff and ask others for their personal contribution.
- Have United Way or a partner agency speak at the event - first person accounts are powerful.
- Make one-on-one requests of employees who didn't attend the meeting.

The #1 way to grow your overall campaign total is to implement a leadership giving campaign.

Additional Engagement Opportunities

New Hires Program

Through employment changes, job losses and moving, pledges are not always honored. A New Hires Program will help replace those losses. Please consider the New Hires program through which new employees are asked to support United Way at the time of hire. It's easy to introduce as part of your normal on boarding procedures, and lets them know they are working for a company that gives back. It is a simple way to increase your employee participation.

Retiree Program - Don't Retire From Giving

Many campaigns struggle to make up for the loss of long-time donors who retire. Ask your United Way rep to help you get a Retiree Program started and allow these generous donors to stay involved.

L3Harris uses the following tactics to reach out to their retiree association. Efforts include:

- Direct Mail appeal
- United Way speaker at membership meeting
- Personal follow-up calls are made to donors who have not responded

Funds from this appeal are included in the L3Harris campaign total.



Legacy Society

United Way is building an endowment to increase resources for local health and human services. Legacy Society members are dedicated donors who make a meaningful contribution to our endowment by leaving United Way of Brevard in their will or estate plan, or by means of another planned giving vehicle. By investing in United Way's Endowment Fund, you can help tackle problems in perpetuity, leaving a legacy of caring and commitment for which you and your family can be proud. The principal of your gift will be maintained while the income generated is used to increase our impact and change lives for the better today – and tomorrow.

Donors can easily make a planned gift, consider "endowing" their annual gift, or take advantage of the United Way Life Insurance Program. Visit www.uwbrevard.org or call 321.631.2740 for more information.

Volunteer

Another great tool to drive engagement in the community is through volunteering. United Way offers volunteer opportunities via our online volunteer matching system at www.uwbrevard.org.

About United Way of Brevard

Targeted Care

Targeted Care allows a gift to be restricted to a specific area of our impact work with volunteer oversight and input. Targeted Impact Areas include the following:

- **EDUCATION:** Success in life begins with a quality education. Yet millions of children lack the support they need to strengthen their literacy, stay on track in school, graduate high school and find a career. We're shifting the odds so tomorrow's leaders can build a better foundation. With an approach to education that spans from cradle to career, we ensure children get strong starts in life, assist teenagers with the tools to learn and grow, and enable young adults to thrive in the job market.
- **FINANCIAL STABILITY:** Without the ability to pay their mortgage or rent, families may find it impossible to achieve a sense of security, let alone take the steps necessary to create a better life for themselves. That's why our work in income is focused on helping people become empowered with the goal of reaching financial stability through the following programs: Volunteer Income Tax Assistance Program (VITA) and Free Financial Education.
- **HEALTH:** When it comes to accessing health services, a person's zip code should never be a deterrent to success, nor should it be a barrier to improved health. For many, it is a daily reality. United Way is fighting for more resilient communities by promoting healthy eating and physical activity, along with integrating health into early childhood development

- **EQUITY IN BREVARD:** United Way will invest in organizations, networks and programs that spark dialogue and action to improve equity in Brevard. Achieving this requires a sustained effort that can only be accomplished when all parties come together to act united.
- **MISSION UNITED:** This initiative connects veterans and their families with the services they need—from securing a roof over their heads, to finding a stable job, to getting health treatment.

Restricted Gifts

United Way encourages unrestricted gifts, which allow our Community Impact volunteers to determine how to meet a broad array of needs. However, we will process designations to 501(c)(3) health and human service nonprofits.

Due to processing costs, designations must be \$130 or greater. Gifts not meeting these requirements will be directed to our Community Care Fund. Restricted gifts are not monitored for effectiveness or impact.



Why United Way of Brevard

Why give to United Way?

You are making an investment that benefits the entire community, not just one program or issue.

We are fighting community issues from an early age, starting with early reading proficiency. This will enable future generations to secure a good job and keep themselves and their family healthy.

With payroll deduction, it is convenient to give back. Spreading your donation throughout the year makes it easier to increase your giving while still staying within your budget.

How is United Way different from other nonprofit organizations?

No other single organization meets the broad range of needs addressed by United Way. United Way goes beyond fundraising by researching the needs of the community and bringing the right resources and people together to solve tough local issues. We work with businesses, governments, and partner agencies to develop health and human service strategies.

We fund programs that are meeting people's needs today, and we are helping to build a better future for our community.

Where does the money go?

Your contributions fund large scale collaborations, individual agencies and specific programs focused on the most significant community needs. See *Community Impact Sheet* for detailed funding information.

Why the Community Care Fund?

United Way's Community Care Fund (CCF) is one of the most powerful ways we help. Donors who choose to give to our CCF (as opposed to restricting their gifts to a specific agency), are assured that their gifts are being used effectively and efficiently.

United Way holds itself highly accountable for how the CCF is invested. The fund is managed by dedicated volunteers who collectively spend more than 1,000 hours each spring reviewing program applications and financial information, and then make funding decisions targeted to maximize our limited resources.

UNITED WAY'S **MISSION**

To be Brevard's leader in mobilizing the caring power of our community.

Frequently Asked Questions

What is United Way's overhead ratio?

United Way of Brevard has the lowest overhead of any United Way in Florida. Our overhead ratio (defined as fundraising and administration expense divided by total revenue) is 10.3%, according to our most recent year 990. United Way's 990/audit are available on the website.

Are all United Ways the same? Is it one big organization?

No. There are over 1,100 separate, autonomous United Ways. We are one of 28 United Ways in Florida and have our own local Board of Directors. We support United Way Worldwide with dues that help provide training and national advertising.

My friend wasn't helped; I'm not giving!

Our partner agencies serve thousand of people every year. However, there are still people who will not be served due to the limited funds that our programs have available. That is why it is so important to have as many people as possible participate in the campaign!

Is giving to United Way voluntary?

Yes! We have a written policy against coercion.

Does United Way fund abortions?

No United Way anywhere in the country has ever provided funding for abortion services.

Can I designate my gift?

We allow designations to any health and human service nonprofit, providing they are a 501(c)(3) organization. A minimum contribution of \$130 per agency is required. Designations not meeting these requirements will be directed to the Community Care Fund. Restricted gifts are not monitored by United Way staff or volunteers for effectiveness or impact.

Can I tithe to my church, or give to my alma mater?

No, giving to your church or school should be generated in the traditional method for those types of organizations.

Why do some United Way agencies charge fees?

United Way provides only a portion of the money needed to provide services. Some agencies charge sliding scale fees so they can help more people.

I never use services - why should I give?

You never know when you, a member of your family or a neighbor may need a United Way service due to job loss, illness or other issues. Your gift helps ensure services are available when they're needed.

Your Workplace Campaign Plan

Campaign Dates:



Campaign Committee Members:

Campaign Strategy (% participation/average gift):

Incentives:

Kickoff/Presentations Scheduled:

Corporate Match/Gift:

Key Staff Contacts

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