

# **Workplace Campaign Toolkit**

## *6 Simple Steps to Hosting an Orrville Area United Way Workplace Campaign*



**Orrville Area United Way**

Orrville Area United Way  
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## About Orrville Area United Way

### OUR Mission

Orrville Area United Way engages the caring power of our community to create a thriving society.

### OUR Values

Education – helping children and youth achieve their potential

Income – promoting financial stability and independence

Health – improving people's health and promoting wellness

### OUR Focus/Impact Areas

#### Nurturing Children and Youth

Programs that provide children with tools that will enable them to be more successful in life.

#### Developing Family and Individual Life Skills

Provides positive outcomes with programs that enable individuals and families to meet the challenges of everyday life by becoming more emotionally, physically, and/or financially stable.

#### Helping in Hard Times

Provides emergency assistance to barriers that prohibit our society's members from thriving.

#### Promoting Good Health

Providing positive outcomes with programs that enable individuals and families to have access to prevention and/or treatment in the health arena, enabling them to become and/or stay healthier emotionally, socially, physically, and/or financially

### Donor Dollars at work

Investments to United Way impact 3 out of 5 people in our community. Over 1,000 volunteer hours are spent evaluating community services so that your gift makes the most impact to those in need. Our United Way is supported by over 2,000 individual donors.



## Welcome, and thank you for your interest in hosting an Orrville Area United Way Workplace campaign!

By agreeing to lead the United Way Campaign in your workplace, you will be an integral part of the success of the campaign. Your commitment and dedication matter to our community.

### What is a workplace campaign?

The United Way workplace campaign unites employees in all offices or branches of a company, and gives them an opportunity to donate, volunteer and speak out for causes that matter to them. You can see the results in your own backyard, even as you're part of a larger mission to affect change worldwide.

The workforce campaign is about more than raising money for worthy causes; it also strengthens connections between employees and their community.

### How does the workplace campaign work?

Workplace giving is an easy and effective way to help employees make a difference and show them that their workplace is actively supporting the local community's most important issues. Employees of a company are given an opportunity to support United Way by donating a portion of their paycheck. In many cases, the donations from employees are pre-tax pay, and many companies match their employees' donations, which makes their charitable contributions go further. Whether you're a small business, major corporation, or even a nonprofit, you can join the thousands of local businesses and organizations that run workplace campaigns each year.

### How do you start a workplace campaign?

Orrville Area United Way will partner with you to develop a customized workplace campaign that aligns with your corporate values, as well as the interests of your employees. We will provide guidance and support to assist you in building your fundraising team and running an effective campaign.



# Six Simple Steps to a Successful Campaign

## 1. Secure top management support.

The support of your President/CEO and top management is essential to a successful campaign. Keep them informed and involved by asking them to:

- Approve your campaign goals & objectives.
- Approve time for training and group meetings.
- Appoint next year's Employee Campaign Manager to serve as your co-chair.
- Appoint a senior manager to run a Leadership Circle campaign and encourage management to give at this level.
- Send a personal letter to managers and employees endorsing the campaign and encouraging support for the campaign.
- Talk briefly about endorsing the campaign during each group meeting.
- Send a 'thank you' to each contributor and volunteer.

***“ The United Way campaign is proof that people have a giving heart, and it's combined with having fun. What more can you ask for at work? ”***

## 2. Recruit a campaign team/volunteers.

Don't try to do it all alone! A campaign team is an excellent way to spread enthusiasm and the work load. Recruit the following individuals for your team:

- United Way Staff and Volunteers
- Representation of all areas of your organization, from support staff to top management.
- Representation from different areas of functional expertise, such as communications/marketing, data processing, labor, management, and trainers.
- Recruit 'natural leaders' in the various departments.
- Recruit people who give generously and are committed to United Way.

### Other issues to consider:

- Utilize the talents of your team members by assigning specific duties and responsibilities, such as publicity, campaign reporting, kickoff.
- Meet regularly, establish a timetable and keep track of progress.

### 3. Train campaign team/volunteers.

The volunteers will help ensure your company has a successful campaign. Below are helpful tips for training volunteers:

- Train campaign volunteers from management, labor, professional and support staff who are well-liked and respected by their co-workers and have a strong commitment to United Way.
- Hold an orientation session to review and discuss campaign literature, solicitation techniques, pledge forms, options for giving and typical questions. Involve United Way representatives in your training sessions.

### 4. Develop a Campaign Plan.

- Invite your United Way representative to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within the company culture.
- Determine the means of pledging best suited to your company: pre-printed pledge forms, one-part pledge forms, or digital pledge forms. Work with your United Way representative to arrange for delivery of all your campaign materials.
- Determine the campaign timeline including the pledging timeframe and any presentations and activities that will be taking place.
- Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, 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.



## 5. Implement the Campaign Plan.

### Promote the Campaign

- Place information (posters, flyers, thermometers, etc.) in high traffic areas around your office such as entry ways and break rooms in the weeks leading up to the kickoff so employees have an opportunity to learn about United Way.
- Use multiple methods of communication to inform people about the campaign: post information on your intranet, announce the campaign at staff meetings, use payroll stuffers, etc.

### Hold the Campaign Kickoff

- Start the campaign with your company's leadership team and campaign committee a week prior to the general kickoff.
- 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. The number one reason 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.
- Be prepared to answer questions about United Way. Ask your United Way Rep for a list of frequently asked questions.
- Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference.
- Inform employees about opportunities such as United Way's Leadership Societies and donor choice program.

We suggest using the following tools during your campaign to educate employees on how their support improves the community:

- Employee Educational Meetings
- United Way flyers
- United Way Video
- United Way Brochure
- Internal Employee Testimonials
- United Way's website: [www.orrvilleareaunitedway.org](http://www.orrvilleareaunitedway.org)

First make a gift to United Way's Community Fund. It's easier to ask if you've already made a commitment. Ensure that every employee is asked to give a gift. Remember that giving is a personal choice and no one should feel pressured to give.

## 5. Cont. Implement the Campaign Plan.

### Monitor and Report Progress

- Send out reminders to encourage people to turn in their pledges.
- Keep a running total of dollars raised as pledges are collected.
- Provide regular updates to employees- send out email blasts, update thermometers, etc.
- 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.
- Complete the United Way Campaign Report form included in your folder. Schedule a drop off or pick up of your campaign envelope, extra campaign supplies, etc.
- Report your final campaign results to employees and leadership.
- 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.

## 6. Maintain year-round communications.

Implementing a year-round communications plan will allow you to keep employees updated and interested in United Way. A few suggestions follow:

- Success Stories
- Volunteer Projects
- Campaign Results
- Impact of United Way in our community

For details, talk to your United Way representative, or contact UW at 330-683-8181.



## Solicitation Techniques...

### Employee Meeting(s)

Employees are invited to participate in a presentation given by United Way representatives on topics relating to each of us and our families. The presentation may include a United Way video.

#### Advantages:

- Better understanding of community issues
- Efficient use of time
- Uniform message
- Flexible method that accommodates the work schedule of the organization

### Personal Ask

Involves one employee personally asking another for their contribution.

#### Advantages:

- More employees are campaign volunteers
- Gives campaign volunteers an opportunity to personally ask for a contribution
- Gives contributors an opportunity to get questions answered immediately

### Leaders in Giving

Leaders in Giving are individuals who give at a leadership level and are recognized in special ways:

Gold Level.....\$1,500 or more  
Silver Level.....\$1,125 to \$1,499  
Bronze Level.....\$750 to \$1,124

#### Advantages:

- Gaining Leaders in Giving members is the most effective and efficient way to build your campaign.
- Leaders in Giving can help motivate and strengthen your campaign through their support, leadership and generosity.

### How to Implement:

Host a Leaders in Giving 'Lunch & Learn' to help recruit new Leaders in Giving and aid in the retention and elevation of current givers. Ask your United Way representative for details.

United Way is proud to recognize the support of our Leaders in Giving in the following ways:

- Names listed in the Leaders in Giving Roster
- Quarterly Leaders in Giving Newsletters

## Retirees

Engaging Retirees as part of the employee campaign helps broaden the base of support for the campaign and offers retirees the opportunity for continued involvement.

## New Hires

Establish a New Hires program to invite employees hired after the campaign period to give and inform them of your organization's support of United Way.

See your United Way representative to help you set up a New Hires program and review the materials available.

## Sample United Way Meeting

2-3 weeks before the meeting, send an invitation from the CEO to all employees stating purpose of meeting. Distribute pledge forms and brochures at the beginning of the meeting.

### Meeting Agenda:

Time	Activity
	ECM's opening remarks.
2 min.	CEO or executive provides statement of corporate support and encourages participation.
4 min.	A United Way representative communicates United Way's community impact.
5 min.	Explain why giving to the Community Fund ensures maximum impact of their gift. Show a campaign film to help raise awareness.
5 min.	ECM: Encourage audience to take an active role in making our community a better place to live and work by supporting United Way.
4 min.	Describe incentives. Encourage payroll deduction. Thank audience.

*United Way meetings can be tailored to your time frame and space availability.*

The following are sample letters for use during your employee campaign. Use the letters as they are, or as models to develop a message that reflects your organization's personal style.

### **CEO Endorsement Letter (1)**

At <company name> we've earned a reputation for caring about our community. Soon you'll have the opportunity to show how much you care by supporting the annual United Way campaign. This is your chance to make our community better and change thousands of lives right here in eastern Wayne County. With one gift to the Orrville Area United Way, you will touch the lives of over 10,000 individuals and families. Only through giving to United Way can your one investment have as much impact on improving lives and strengthening our community.

Please join me in supporting this year's effort by contributing as generously as you are able. It is all of us giving together that makes this community stronger.

### **CEO Endorsement Letter (2)**

At <company name> we have always prided ourselves on our leadership and dedication to our community. The Orrville Area United Way is committed to focusing on the most critical needs in the community. Only through giving to United Way can your one investment have as much impact on improving lives and strengthening our community.

That is why our company actively supports the annual United Way campaign. As we begin the 2021 campaign, your continued support and generosity are appreciated. Your leadership and commitment inspire the generosity of others.

As you consider your investment in United Way, I hope you give serious thought to <continue giving at or giving at> the Leadership Circle level.

Thank you for considering a gift at the leadership level. It is donors like you, and all of us giving together, who make this community stronger.

### **Thank You Leadership Giving Letter**

Thank you for participating in this year's annual campaign for the Orrville Area United Way. In 2021, our employees raised <\$>, which will help make an impact on the most critical needs facing our community.

Only through giving to United Way can your one investment have as much impact on improving lives and strengthening our community, and we appreciate your ongoing commitment.

You can be truly proud that your gift helps 3 out of every 5 people in our community. Thank you for caring about what matters most.

# **Campaign Checklist:**

## **Before the Campaign**

- Meet with your United Way representative.
- Attend one of the Campaign Coordinator Trainings in June/July.
- Secure CEO/Senior Management support.
- Review Campaign history and set your goals.
- Recruit a campaign committee to help with the campaign.
- Determine your campaign plan, timeframe, and any incentives.
- Gather your campaign communications and any campaign materials.
- Schedule your kick-off, United Way speaker, and any special events.
- Promote the campaign with an announcement.

## **During the Campaign**

- Distribute pledge forms and campaign materials to every employee.
- Promote the campaign, kick-off, and special events through numerous channels.
- Hold a mid-campaign committee meeting to review the progress towards the goal.
- Send regular progress reports to employees.
- Follow-up with individuals who have yet to turn in their pledge form.
- Send reminders about campaign events, incentives, and deadlines.

## **After the Campaign**

- Collect all pledge forms and campaign material.
- Schedule a time with your United Way representative to complete the paperwork.
- Take care of any corporate contributions or matches on employee giving.
- Send a thank you letter to everyone including the campaign committee and the CEO.
- Publish a short story, photo, and the results of your campaign in the company newsletter.
- Hold a post campaign committee meeting to evaluate the challenges and successes of the campaign. Keep the notes handy for next year!
- Talk to your United Way representative so that we can continue to improve our service.

## **Year Round**

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

