



HOW TO RUN A WORKPLACE CAMPAIGN GUIDE 2023

LIVE UNITED

		
<p>United Way of Frederick County</p>		<p>IMPACTING LIVES Est. 1938</p>

RUNNING YOUR WORKPLACE CAMPAIGN

Whether you're at a small business, a major corporation or even a nonprofit organization, you can join the hundreds of local businesses and organizations that support United Way of Frederick County and invest in our community each year.

Setting up and running a campaign is simple, and we will help you every step of the way. This Workplace Campaign Guide gives you the basic steps to follow with timelines and checklists to use. Other materials are available in our online toolkit, including sample letters and emails. We can also provide you with speakers, examples of fun activities, and anything else you need.

Thank you and let's get started!



STEP 1

PREPARE

It is important to know what you need to do before jumping into a campaign. You can work with United Way staff and your coworkers to make your campaign a success. In this section, you will learn more about the key elements of successful planning.

- 1.1 What does United Way DO?
- 1.2 Understanding Your Role
- 1.3 Recruiting your Campaign Team
- 1.4 Organize a leadership giving program
- 1.5 Campaign Plan and Timeline

IN FREDERICK COUNTY



36% OF HARDWORKING HOUSEHOLDS STRUGGLE

to pay for basic essentials like:



FOOD



TRANSPORTATION



HOUSING



CHILD CARE

WHAT WE DO



1 WE IDENTIFY LOCAL NEEDS

We research the root causes of challenges in our communities and share the results. We update the data on a regular basis so we can identify trends and take action.



2 WE DEVELOP SOLUTIONS

Health, education and financial stability are the building blocks for a good quality of life and a strong community. We fund programs that take on challenges in these three areas to drive systemic change.

Last year, we invested \$2,718,046 into our community, converting every \$1 contributed to \$4.77 in direct community impact.

3 WE BRING PEOPLE TOGETHER

For more than 85 years, we have worked with local governments, businesses, schools, nonprofits, volunteers, and others to accomplish what no one can do alone. We advocate and drive change. We support a network of over 100 nonprofits in the area.

4 HOW YOU CAN HELP

Give to United Way, and make your gift go further. Advocate with us, and move policies that strengthen our communities. Volunteer with us, and change a life for the better.



GIVE

Every dollar matters. Your generosity funds work that makes positive, sustainable change possible.



ADVOCATE

Your voice is powerful. Raise awareness about causes that affect critical public policies.



VOLUNTEER

Sharing your time is invaluable. Join the thousands of volunteers who use their talents to impact lives every day.

WE CHANGE LIVES FOR THE BETTER



1.2

UNDERSTANDING YOUR ROLE

As an Employee Campaign Coordinator (ECC), your overall role is to plan, coordinate, delegate, and implement a successful United Way campaign for your workplace.

You are responsible for:

- Developing a campaign plan/timeline with United Way staff.
- Recruiting a campaign team – if needed.
- Secure support from the top and making it known.
- Coordinating the overall execution of the campaign plan and representing the campaign to employees.
- Asking and reminding employees to give and fill out pledge cards.
- Identifying issues that may arise and take action.
- Thanking all coworkers involved with the campaign.
- Evaluating your campaign and making recommendations or plans for next year's effort.

1.3

SECURING SUPPORT FROM TOP-LEVEL MANAGEMENT

The most successful campaigns have strong support from senior leadership. Meet with your organization's executives and confirm their support for your campaign. Map out any places where you'll need their specific involvement, such as sending an email from the CEO to kick off the campaign. Make sure they know about campaign dates and goals, and be sure to ask about any corporate gifts or company matching programs for employee gifts. This is a very important first step.

1.4

SETTING A CAMPAIGN GOAL

Employees want to have something to strive for, so set a campaign goal for your company! If you ran a campaign in previous years, look at the numbers and think about what you can achieve. Choose a goal-either for dollars raised or total participation. You can use a thermometer in our Toolkit so your coworkers can see their progress. You and your team will feel great when you reach your goal.

Pro-Tip: Ask senior leadership if you can offer incentives to employees for hitting the goal-perhaps a donuts for a department or pizza lunch for the company.

1.5

CAMPAIGN PLAN AND TIMELINE



12-weeks

- ❑ Plan your campaign with United Way. Determine start and end dates, map out any events and set your fundraising goals.
- ❑ Review the comprehensive United Way of Frederick County online toolkit so you know all the resources available to you. If anything you want is missing, contact United Way staff.
- ❑ Look over notes from past campaigns (if available) or meet with previous ECNs to review challenges and successes.
- ❑ Recruit campaign team members.
- ❑ Brief senior leadership.

10-weeks

- ❑ Finalize your organization's campaign team.
- ❑ Begin regular communication with United Way team and schedule meetings as needed.

8-weeks

- ❑ Finalize your United Way giving platform. (MobileCause, pledge forms, or internal).
- ❑ Develop a campaign theme and calendar of events.
- ❑ Plan and recruit volunteers for volunteer opportunities.
- ❑ Begin planning any special events associated with the campaign (kickoff, conclusion, raffle, etc.).

6-weeks

- ❑ Develop an internal communication plan for your campaign, making sure to check out United Way's online toolkit for templates and other materials.
- ❑ Finalize locations and plans for volunteer opportunities.
- ❑ Let United Way staff know if you would like someone to help tell the United Way story during your campaign. You will have a video success story available to show also.

4-weeks

- ❑ Look over sample talking points on what United Way does in the Frederick community to build your presentation for the kickoff. Check our online toolkit for downloadable slides.
- ❑ Try to find coworkers or someone close to your organization that has been effected by United Way. This could be a person who has benefited from services in some way or even someone whose outlook changed after a United Way volunteer opportunity. People relate to their peers. Don't be afraid to ask if someone has a story to share.
- ❑ Practice your presentation to colleagues so you are ready to tell the United Way story.

2-weeks

- ❑ Send "preview" email about campaign kickoff and how employees can give.

LAUNCH!

- ❑ Host kick-off event for all employees.
- ❑ Throughout your campaign, make sure you are asking for your coworkers to pledge their gift to United Way. People won't give unless you ask!
- ❑ Send initial pledge email and make sure you have a timeline to send reminders throughout the campaign.
- ❑ Remind your team of your campaign goal and set check-ins to discuss progress throughout the campaign.
- ❑ Continue sharing about why to give, with help from the United Way team. We will be sending regular communication for you to pull stories and ideas from.



STEP 2

INSPIRE

A key part of your campaign is talking about the work United Way does in your community. This will encourage coworkers to contribute to your company's campaign. Below you'll find ideas for how and when to promote United Way information to your colleagues.

Volunteer Opportunities

Engaging employees in volunteer opportunities will give them a connection to the work United Way does. Through our Volunteer Center, we can connect you with nonprofits for year round opportunities. We sponsor Stuff the Bus in the summer and Day of Action in October where your company can play a major role. We can give you names of employees who have participated in past years to share their experiences. If you are interested in setting up a volunteer opportunity for your organization, please contact us. United Way is a resource for your organization to fulfill its Corporate Social Responsibility goals.

Promotional Materials

We're here to help! United Way has ready- to-go materials for you to promote your campaign, including:

- Videos and success stories
- Template email messages that you can customize
- Fun ways to foster competition and engage your coworkers
- And much, much more in our online toolkit

Many companies like to develop their own materials to promote their campaign. We think that's great! Talk to your United Way representative to brainstorm ideas and see how we can help. Please send us your materials before launching so that we can ensure you're getting everything right.

BEFORE the Start of the Campaign

- ❑ Share information about United Way's latest work. This can be done by email, during planning meetings, in the break room – anywhere! *
- ❑ If you have the information, thank prior year donors. It is important to acknowledge your employees that have given in previous years. Be sure to appreciate them leading up to the campaign kickoff.
- ❑ Share prior year results. By sharing prior year results and potentially sharing your campaign goal for this year, you are giving your employees something to work toward! If you would like help setting a goal, please speak with United Way staff.
- ❑ Share schedule of activities for upcoming campaign. This schedule will give your coworkers something to be excited about once the campaign starts.
- ❑ Send campaign preview email. *

DURING the Campaign

- ❑ Send campaign kickoff email from your CEO. Go over how to pledge. Send donation reminders. *
- ❑ Send donation/pledge sheet reminders.
- ❑ Offer speakers from United Way. This way, they can see who is doing the work and who is benefiting from the work.
- ❑ Inform about incentives or corporate matching gifts. If your senior leadership has matching programs or corporate gifts, it can make employees want to give more!
- ❑ Tell your employees about volunteer opportunities that will make them feel more connected to the United Way mission. *
- ❑ Send last call reminder email. *

AFTER the Campaign

- ❑ Highlight campaign results. It is good to be proud of all that your employees have raised! Share this number and be sure to thank everyone who contributed.
- ❑ Thank donors for contribution. You may want to host a breakfast for the donors or give them small gifts as a thank you. Whatever you decide to do, make sure you thank them!
- ❑ Send thank you email to your campaign team.
- ❑ Send thank you email to donors on top of other thank you.



Items with an asterisk (*) are available on our website in the campaign toolkit. If there is something not included that you think would be useful for your campaign, let us know and we will try to come up with something to fit your needs.



STEP 3

ASK

People do not give if they are not asked. It is important that during your campaign you ask your coworkers to give to United Way, whether that is in person, during kickoffs or through email. Here are tips for how to make “the ask.”

Talk to your United Way representative.

We are available to help you come up with the best strategy for making your ask.

Get the donors’ undivided attention.

Talk to your coworkers at a meeting or kick-off event or an-hands staff meeting to consider participating in the United Way campaign.



Tell the United Way story.

Come prepared with why people should give and the value United Way has in our community. If you would like a United Way representative or need success stories about how each dollar makes a difference, please let us know at the beginning stages of planning your campaign and we can have something ready. We can send stories specific to the interest of employees for you to share, ask our nonprofit partners to talk about how our grants helped their organization or have a UWFC rep speak about how United Way helps the community as a whole. Many of you have coworkers that can share their own experiences working with United Way that will make it even more personal. We will provide you with names of those we know during your planning stage.

Explain how to give.

Decide which giving platform to use for your organization's campaign. There are a couple options to choose from. You can use an online pledge form or a paper pledge form. Some organizations also use their own software for pledging. United Way can provide you with online pledge forms, paper pledge forms or both. Keep in mind, if you work for a larger parent organization, your company may have already determined the giving platform to use. Check with your contact at the parent organization to learn more.

Address concerns and questions.

Know your materials and answer questions honestly. If you don't know, ask United Way to help answer questions. Not everyone will have the same questions or concerns, but make sure you are positive about finding answers to everyone's questions. We want all donors to be comfortable with their gifts.

We know it can be especially difficult to ask for donations and we are here to make that process as easy as possible. If you would like suggestions, tips or for a speaker to make "the ask," please let us know.

Our two main giving platforms are:

PAPER. Employees fill out paper pledge forms and return them to you, the Employee Campaign Coordinator. Your job is to collect pledge forms, make copies for the donors and your payroll department and deliver the original to United Way.

ONLINE-MOBILECAUSE. MobileCause is an online giving platform that allows employees to use a customized link to make their donations. If you select this option, United Way can send you Excel spreadsheet updates of employees who pledge and any information you might need about their pledges.



STEP 4

THANK

Remember to thank top-level management support.

The most successful campaigns have strong buy-in from senior leadership. Thank them for their support of the campaign from start to finish. If they were able to secure corporate gifts or company matching programs, be sure to thank them for their leadership and contributions.

Remember to thank your campaign team.

Your team will have helped your company's campaign from start to finish. They were able to lighten your workload and increase involvement in the campaign. Thank them for their dedication and hard work.

Remember to thank all those who donated or participated in events.

At United Way, we are extremely grateful for every gift, large or small. Be sure to acknowledge each employee that donated, advocated or volunteered during your company's campaign.

Give United Way a chance to say thank you.

Share donor details so that United Way is able to include employees on thank you mailings and give them updated information about what we do throughout the year.

Donors who gave at Leadership levels are eligible for membership in the Emerging Leaders United, **Leaders United**, and DeTocqueville Society. These memberships include educational opportunities, luncheons, meeting with other like-minded community volunteers, happy hours and more.

CAMPAIGN WRAP-UP Report Results

After thanking your employees, there are a few things left to do.

- ❑ During your company's campaign, collect all gift information.
- ❑ If you collect paper forms, look them over, if possible, to ensure everything looks correct.
- ❑ Fill out the Report Envelope Collection Sheet.
- ❑ Schedule a time with United Way to pick up results and any materials that you used during the campaign.

CAMPAIGN WRAP-UP Plan Ahead

Take a deep breath, then get a head start on planning for next year.

- ❑ Gather feedback about the campaign from senior leadership, campaign team and United Way representatives. Talk about what worked and what didn't work, and start a conversation about new and different ideas to try for next year.
- ❑ Save all relevant notes and resources in an easy-to-remember place for volunteers to use next year.
- ❑ If you want to pass the torch, recruit and identify next year's ECC and make a formal introduction between the new ECC and United Way staff.

CAMPAIGN WRAP-UP Keep Thinking

United Way has events and opportunities throughout the year, even when campaigns are not running! Here are some ways to stay involved and updated.

- ❑ Register on our volunteer site (volunteer.unitedwayfcdc.org) so you can involve coworkers in opportunities to help out in the community year round.
- ❑ Work with Human Resources to implement a new-hire program to give new employees the opportunity to contribute when they join the company. Ask your United Way representative for help and ideas on this front.
- ❑ Implement a year-round communications program that shares the impact of United Way's work. We send out regular communications about our work. If you aren't receiving emails and would like to, talk to your United Way representative and get added to our list!



THE POWER OF GIVING

These are just a few of the local businesses that are already hosting Workplace Giving Campaigns. Will you join us?



Thomas, Bennett & Hunter, Inc.



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