United Way of Carlisle & Cumberland County

Workplace Campaign Coordinator Action Guide

www.uwcarlisle.org  717-243-4805
Everyday Heroes, empowering our community, one donation at a time. With one donation, you can help thousands of people. United Way of Carlisle & Cumberland County does what no single organization can do alone: We tackle the toughest issues facing our community by focusing on education, health, and financial stability, and we mobilize every resource, partner, and voice to create the foundation for our neighbors to have a quality life. Change does not happen alone. It takes all of us, standing together. UNITED.

5 STEPS TO RUNNING A SUCCESSFUL CAMPAIGN

1: ENERGIZE
Recruit a strong team to lead your United Way campaign.

2: INSPIRE
Share the United Way story with all employees.

3: ENGAGE
Connect employees to our work and show them how they can do something about it.

4: ASK
Ask everyone to give.

5: THANK
Thank everyone for giving.
1: ENERGIZE

Energize your colleagues by:

- learning about the work of United Way.
- recruiting a team for your company’s campaign.
- setting your strategy and goals.

Form a Campaign Committee:

- Don’t run your campaign alone. Identify employees who are energetic and have a variety of skills to serve on the campaign steering committee.
- Involve representatives from various departments in your organization i.e., marketing, human resources, accounting, etc...
- Involve them in planning a strategy and setting a goal that fits your company’s size and culture.

Establish Support from the Top:

- Get your CEO actively involved in all aspects of your campaign, from email communications to rallying colleagues, to sending invitations to employees to attend workplace fundraising events.
- Send messages from the CEO periodically via internal emails or memos about the campaign. Find CEO email examples at: uwcarlisle.org/toolkit/.

Be Prepared:

- This year we are all facing new and different challenges. Our dining room tables have become our home offices and face-to-face meetings have been replaced with Zoom and other virtual meetings. In addition, many companies have been economically impacted by COVID-19. We understand! Be prepared for changing workplace safety precautions. Be flexible and prepared for in-person or virtual presentations during your campaign.

Organizing a Successful Campaign:

- Every gift to United Way helps make a difference in the lives of your friends and neighbors. Engaging your co-workers is another great way to share the importance of our work. Every opportunity to engage matters. Every gift matters.
- Evaluate prior year results, number of employees, percent participation, average gift size, etc...

Traditional or Digital Campaign Info:

- Determine if a traditional or digital campaign will work best. Go to: UWCarlisle.org/toolkit to access pledge forms and materials. For printed materials call UW office at: 717-243-4805 or email: luflickinger@uwcarlisle.org.

Set Participation & Pledge Goals:

- Set an employee participation goal. Set a dollar amount goal by reviewing last year’s average gift and set a realistic monetary goal. Increasing participation will help you reach the monetary goal.

Set a Goal of 100% Ask:

- Make sure that everyone has an opportunity to give in-person or online. All UW campaign materials are on our website so you can run a contactless campaign, if needed.

Develop & Establish Giving Timeline:

- While the period of direct solicitation within your workplace should typically take two weeks for solicitation and two weeks for follow up, the campaign does not just “happen”. Choose which of the best practices and “fun-raisers” you will employ and prepare for them. Schedule United Way virtual presentations in advance and plan publicity efforts that will surround your campaign.
- Visibly track results throughout the campaign.
2: INSPIRE

Inspire colleagues by:

- encouraging employees to get more involved with United Way’s work to improve individual lives and our community.
- helping them see the impact they make through the United Way.

Share the United Way Story:

- Share videos and stories featuring those impacted by United Way. You can download both from United Way’s Campaign Toolkit.
- Make plans to send a series of emails to employees to keep everyone informed of the good work that United Way does in the community, as well as your campaign progress.
- Place United Way infographics and prize posters in key meeting areas and break rooms.
- Share 100% donor of your undesignated donation supports local programs.
- Share “Donor Dollar Funding Facts,” from UW Giving Outline.

Harness the Power of Personal Testimonies:

- Ask a colleague who has benefitted from United Way to share his/her experience.
- Show our United Way ALICE video and share how UW funding impacted her life.

Invite Employees to See United Way’s Work in Action:

- Join a Community Impact Panel to learn more about how donor dollars are making a direct impact.
- Promote Day of Caring & partner agency volunteer projects which encourage team building as well as helping community organizations.

Heroes United — 2020 Campaign Co-Chairs:
Adam Shaffer, Hoffman Funeral Home & Crematorium and Patrick Bartoli, Morgan Stanley Wealth Management
Engage your colleagues:
connecting the work of United Way and how they can do something about it.

3: ENGAGE

Get Employees Involved:
- Attend and invite your colleagues to attend the United Way Campaign Kickoff on October 9th, 7:30am at Carlisle Fairgrounds, Building T.
- Hold a company-wide kick off at the office or via ZOOM at the beginning of your campaign.
- Use special events and fun activities to add an additional spark to your campaign.
- Incorporate United Way into already-planned meetings and events.

Ideas for Special Events:
- Issue an executive virtual challenge. Donate or “dare your management team to raise money. Share video clips of activities such as push-ups, jumping jacks, pie-in-the-face, and donate.
- Bond with your team at virtual happy hour, parking lot social or host meetings with a theme, like sports teams, super heroes, celebrities, or local heroes.
- Take a team, department or company photo in front of your company sign. Share on social media.
- Hold a drawing for everyone who donates. Offer incentives such as prime parking, coupons to leave early or arrive late, casual day, a day off, gift cards, lunch with a VIP, or a volunteer service day.
- Have Dress Down Day(s) or Dress-up for a donation, employees can donate to participate and feel connected.

Give employees an opportunity to do more through leadership giving:
- Share the impact and benefits of leadership giving ($1,000+) at management and employee meetings.
- Promote Women United ($500+) among existing women’s groups and female employees.
- Share with employees 40 and under the benefits of becoming a member of the Emerging Leaders Council ($250+).

Day of Caring
- Each year, hundreds of volunteers come together to make a lasting difference in our community through Day of Caring projects. Volunteers enjoy a meaningful volunteer experience and a firsthand look at the good being done in our area. Get your team personally involved by signing up to complete a service project at Day of Caring on Friday, October 9th.

2019 Day of Caring
M&T Bank Team

2019 Day of Caring - Mowery Construction Team
The number one reason people do not give is because they are not asked.

Make it a priority to educate and provide the opportunity for every employee to give. United Way believes that giving is a personal decision. No one should feel pressured to give!

How to Ask:
- Ask colleagues face-to-face. If working remotely consider phone calls instead of emails. People give to people.
- Promote any corporate match, corporate gifts or other incentives to increase contributions.
- Ask leadership to attend meetings or events, publicly endorse the campaign, and encourage employees to do so as well.
- Invite a United Way representative and a partner agency representative to speak in-person or virtually with your employees during a meeting or event.

How to Give:
- Workplace Campaign toolkit includes: electronic and printable pledge forms, sample email messaging, video links, materials, and more. Access toolkit online: UWCarlisle.org/toolkit/
- Payroll deduction (paper or electronic pledge form) the easiest way to give
- Cash/check
- Credit card
- TEXT: UWCarlisle TO: 41444
- Online and via Paypal: uwcarlisle.org/donate/
- Direct billing
- Stock transfer

Workplace Campaign

Tips for rolling out your digital online or traditional campaign.

- **Set dates** and establish workplace campaign timeline between 9/1/20 - 12/31/20.
- 2 week campaign *(suggested time-frame)*
- 2 week pledge form collection & follow-up
- 1 company-wide special event
- **Communicate** start, mid-point, and end date of workplace campaign.
- **Distribute** pledge forms along with company workplace campaign messaging, UW prize raffle details, and UWCCC Info-graphic.
- **Send mid-campaign reminder.** Be sure to include updates such as pledge goal progress, average gift amount, and participation percentage update.
- **Wrap up** and send final reminder to all employees, collect pledge forms, complete Company Campaign Total Report Form available online: UWCarlisle.org/toolkit/

Orrstown Bank Colleagues at the 2019 Kickoff Event
5: THANK

Say it:

- Through their generous gifts to United Way, your campaign team and colleagues have helped make a better future possible for our neighbors. Make sure all donors hear a great big THANKS!
- Consider hosting a thank you event for employees. Announce results via internal communications and send a thank you letter or email to all donors.
- Be timely with your thank you efforts. Ensuring employees have a positive experience is critical to reinforcing your appreciation and creating consistent donors.

Wrap it Up & Send it in:

- All pledge forms are available online at: uwcarlisle.org/toolkit
- For those using online pledge forms, email a copy of you workplace payroll pledge forms and your Company Campaign Total Report form to: luflickinger@uwcarlisle.org.
- If using our paper pledge forms, please drop off or mail your campaign report envelope with white copies of all pledge forms to the United Way office.
- Help ensure United Way is able to thank your company’s donors. Compile a complete and accurate list of donor contact and gift information.

A little thanks goes a long way! Thank you ideas:
- Pizza or cupcake party
- Casual or jeans day
- Appreciation candy grams: candy bar and note of thanks you can leave in mailboxes or on desks
- Happy hour meet up or work get together after hours or via Zoom!

Dickinson College: Dottie Warner & The Bowling Stones at our 2019 Bowl for the Goal Fundraiser
RESOURCES

Your United Way representative is here to help you energize, engage, and inspire employees throughout your campaign. Contact them for help with your questions, scheduling speakers, and implementing new campaign strategies.

ONLINE RESOURCES AND DOWNLOADS
Go to UWCarlisle.org/toolkit/
- Campaign Info Sheet (digital/printable)
- Prize poster (digital/printable)
- Pledge forms (digital/printable)
- Text-to-give bookmarks (printable)
- FUN in Fundraising idea sheet (printable)
- Campaign videos (direct link)
- United Way logos (download)
- AmazonSmile flyer (printable)

OTHER RESOURCES:
- Window clings
- Yard signs
- Flags
- FamilyWize cards

UNITED WAY OF CARLISLE & CUMBERLAND COUNTY

United Way fights for the health, education, and financial stability of every person in every community.

Address: 145 S. Hanover Street, Carlisle, PA 17013
Facebook: Facebook.com/UWCCC
Instagram: @UWCCC
Twitter: @UWAYCARLISLE
YouTube: Youtube.com/UWAYCARLISLE

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