

HOW TO RUN A GREAT UNITED WAY CAMPAIGN



United Way of the Bradford Area, Inc.

WELCOME!

Thank you for leading the leading the United Way campaign at your company! As an Employee Campaign Chair, you are an invaluable partner with the United Way of the Bradford Area, Inc., engaging your organization/company in the fight for the health, education and financial stability of all the communities we serve.

This handbook is your basic guide for how to **PREPARE, PLAN, CONDUCT**, and **CONCLUDE** your company's campaign. We offer you many ideas, strategies, and resources to help make your campaign a success. And remember, United Way staff and Board members are here to help in any way we can!

WHAT WE DO

UNITE

We bring together donors, volunteers, businesses, nonprofits, faith-based, community leaders, government, experts and those in need to address challenges in the areas of education, income and health. Together we work toward bold community goals for the future.

STRATEGIZE

We break each problem down to its root causes and with our stakeholders; develop research-based, comprehensive strategies to make significant and sustainable progress toward our goals.

TACKLE

Once strategies are set, it is time for action. We invest in programs or create initiatives designed to move us towards our goals. We convene committees, advocate for public policy, raise awareness and mobilize volunteers.

EVALUATE

We create metrics and continuously evaluate the results of our investments, holding every program and initiative accountable to make meaningful progress.

GOALS

Education – Increase percentage of youth receiving educational programs and childcare

Income – Increase the percentage of individuals who are financially self-sufficient

Health – Increase well-being of community members through health initiatives

Running a Workplace Campaign

As the Campaign Employee Chairperson for your company/organization, you are the centerpiece of your United Way Campaign. You will make a difference in the community you serve when you put together an engaging, meaningful and fun workplace-centered campaign.

Here is how you can get started:

Prepare

- Learn about the United Way of the Bradford Area, Inc. and the community support they provide.
- Speak with your CEO to discuss campaign goals, secure their endorsement, request permission to make presentations/fundraise, offer incentives to employee donors and confirm a corporate match or donation.
- Participate in United Way calls with your CEO so you are connected to the goals set for your workplace campaign.
- Speak with your United Way representative to discuss how they can help support your company's campaign.
- Recruit a campaign committee, reach out to diverse departments.
- Assign specific tasks to your team and schedule periodic planning and progress meetings.
- Attend a United Way of the Bradford Area, Inc. Campaign Connect Zoom meeting to learn how to run a campaign and ask questions.
- Visit uwbanews.org and the campaign toolkit page for ideas and best practices.
- Analyze the previous year's campaign results.
- Set goals, timelines, and strategies, including goals for total donations, participation levels, special event dollars raised and other

Plan

- Determine campaign theme and length that works best for your organization.
- Make your campaign engaging by developing a fun theme and tying it back to the United Way's mission.
- Review campaign print materials and other resources available on the United Way campaign website.
- Set a rally schedule and invite your United Way representative to speak.
- Plan and schedule special events and fundraisers.
- Consider running a raffle to engage your coworkers while raising additional funds for the campaign.
- Request banners, balloons, posters, stickers, and more from your United Way representative to decorate rallies and informational displays.
- Meet periodically with your United Way representative to review planning decisions and secure their commitment to attend your festivities/events.

Conduct

- Educate employees by promoting your campaign through a kick-off event, presentations rallies and other scheduled special events.
- Send a customized kick-off email to employees.
- Include incentives for attendance, participation, donations and reaching departmental or organizational goals.
- Use a multimedia approach, including periodic emails, videos, intranet content, social media posts, voicemails, pay stub inserts, posters and displays – any place that’s convenient to reach your coworkers. Find content at uwbanews.org, campaign toolkit.
- Hold one or more presentations/zoom calls with United Way representatives to discuss goals and new initiatives.
- Bring employees together for a themed meal or in smaller group, by department.
- Highlight an organizational spokesperson who can provide personal insight as to why the United Way campaign is important to them.
- Provide campaign brochures for every employee along with other pertinent handouts.
- Provide details on how the pledge process works at your organization/business.
- Utilize United Way produced videos, emails and stories. Find them at uwbanews.org, campaign toolkit.
- Specifically ask coworkers to participate by donating, volunteering or advocating.
- Participate in a ‘Day of Action’ volunteering or any workplace-sponsored community action activities.
- Follow up with employees and past donors, reminders are often appreciated.
- Account for off-site employees, new hires and retirees – follow up with employees who are returning from maternity leave, vacation, disability or travel.
- Update coworkers and CEO on your progress toward goal establishment.

Conclude

- Consider final push and close-out strategies to encourage last-minute commitments.
- Always recognize donors. Show them the impact of their contributions on the community and encourage them to stay engaged with United Way efforts.
- Write a thank you message in your organization/company’s newsletter or intranet.
- Plan a thank you event and invite donors to attend.
- Send a letter or email from the CEO thanking everyone who contributed to the campaign.
- Thank you campaign team/committee.
- Critique and document the campaign to ensure that next year’s campaign goes smoothly with your internal committee and United Way representatives.
- Fill out the pledge envelope and arrange for it to be received by United Way, along with any surplus materials.
- Develop a year round United Way program with newsletter articles chronicling community impact, volunteer opportunities and agency tours, orientation sessions for new employees and more. Be creative while working within your organizational culture.
- Invite your United Way representative to speak to employees at any time during the year to share

TOP 10 CAMPAIGN TIPS

- 1. Timing:** choose a campaign timeline that best fits your organization/company's activity levels and allows your fellow employees and leadership to be most engaged. The length of the campaign also is a key consideration.
- 2. Get high-level buy-in:** Leadership donors can drive a campaign's success by creating momentum. When the CEO and senior management are the first to give, others will follow their example. Suggest that a special leadership-giving chairperson be assigned to target those able to give at a higher level.
- 3. Advocate for a corporate match:** Connect corporate giving to employee giving by creating a corporate challenge match for employee donations.
- 4. Be visible:** Get on the agenda for scheduled organization-wide events, department meetings or other company gatherings. Plan these presentations in advance of the full campaign.
- 5. Participate in 'Day of Action':** Schedule in the Fall when most campaigns are in full swing, an volunteer event is a great way to help people in your community. This is a great way to show your employees the impact their donations can have.
- 6. Kick off strong and create incentives:** A launch event sets the tone for the campaign. This is a great time to announce incentives, contests and drawings.
- 7. Make it personal:** A personalized ask is best, particularly from a friend or colleague. Use personal connections and knowledge in emails and all campaign communications.
- 8. Promote. Publicize. Plan:** Raise awareness of United Way's work. Send email updates. Be a presence on your company's intranet. Form a committee. You can count on United Way support and advice on your publicity and marketing efforts.
- 9. Thank and celebrate:** Acknowledge those who help. Involve and recruit others who share your commitment. Thank them multiple times. These actions are a big part of making your current campaign a success and setting the stage for next year.
- 10. LIVE UNITED:** Opportunities to 'Live United' don't end when the campaign ends. Let your colleagues know about year round opportunities to volunteer in the community and advocate for issues through United Way.

Workplace Campaign Checklist

Before Campaign

- Secure CEO/Senior Management Support
- Determine your participation goal, monetary goal and incentives
- Recruit a team to help with the campaign and assign tasks
- Review the previous year's campaign performance, opportunities and challenges
- Determine your campaign plan and time frame
- Schedule your kick-off and special events/fundraisers
- Promote the campaign and distribute your calendar of events
- Send a campaign kick-off letter from your CEO endorsing the campaign

During Campaign

- Hold kick-off event
- Distribute pledge forms and campaign materials to all employees
- Keep the campaign alive by sharing progress, community facts, photos, etc. via your intranet
- Conduct special events, lunch and learn, Zoom calls, and fundraisers
- Monitor your progress towards your goal
- Follow-up with individuals that have not returned their pledge forms
- Send reminders about campaign events, incentives and deadlines

After Campaign

- Collect all pledge forms
- Follow up on any corporate contributions or employee matches
- Calculate the results, review results with your committee members and prepare a final report envelope for United Way submission
- Announce results to all employees
- Post campaign photos on your corporate social media networks
- Evaluate the challenges and successes of you campaign. Keep the notes handy for next year
- Thank all donors with a celebration event/gift, letter or email from your CEO and a presentation from a United Way representative
- Provide your input to United Way on ways to improve its service