

**United  
Way**



**United Way of South  
Wood & Adams Counties**

# **WORKPLACE CHAMPION GUIDE**



**United we change and  
strengthen lives by investing in  
our community.**

**LIVE YOUR PURPOSE**

*That's you!*

# Champion / [cham-pee-uh n]

1. a person who fights for or defends any person or cause.

ie:

a **Champion** of United Way in your workplace.

2. a person who takes first place.

ie:

anyone who serves as a United Way **Champion** is a winner for taking on this role.



United Way of South  
Wood & Adams Counties

# TABLE OF CONTENTS

THANK YOU for taking on this role as the United Way Champion in your workplace. Whether you volunteered, or were volunteered by someone else, know the importance of your role and impact you make.

As a United Way Workplace Champion, you'll have an opportunity to showcase your leadership and project management skills at work, network with colleagues at your workplace and in other industries, and create positive impact in our community.

We've prepared this guide to help you maximize your time and effort. Trust us. These tips are proven to work. If you follow them, your workplace campaign will be successful.

<b>Where to Begin</b> .....	<b>4</b>
<b>5 Best Practices for a Successful Campaign</b> .....	<b>4</b>
<b>Workplace Campaign 101</b> .....	<b>6</b>
<b>UWSWAC “Elevator Speech” Language</b> .....	<b>7</b>
<b>Campaign Timeline</b> .....	<b>8</b>
<b>Meeting Goals</b> .....	<b>11</b>
<b>Incentives</b> .....	<b>12</b>
<b>Glad You Asked</b> .....	<b>13</b>
<b>Upcoming Events</b> .....	<b>14</b>



# WHERE TO BEGIN

## 5 Best Practices FOR A SUCCESSFUL CAMPAIGN

### 1. PREPARE

- Every company culture is different. United Way campaigns are flexible and easily customized. We'll help you tailor yours to match your corporate goals, philanthropic focus or time and resources.

### 2. ENGAGE: Make giving personal and meaningful

- **Be the first pledge.** Then, thank those that follow your example.
- **Make it relevant.** Ask people about how much they spend on coffee or other small items per week. Would they be willing to donate that money to the campaign?
- **Invite Questions.** Be prepared for concerns by being knowledgeable about United Way's work.

### 3. MOTIVATE: Create specific events that inspire action

- **Make challenges achievable.** Asking people to give \$2 per week sounds easier than \$100 per year.
- **Create competition.** Whether it's between departments or floors, locations or branches, create a contest to see who raises the most money, has the highest participation rate or signs up the most volunteers.





# 5 BEST PRACTICES, CONTINUED...

## 4. **ASK: “Not being asked” is one of the top reasons for not giving**

- Personal contact and positive attitude are critical to your campaign team’s success.
- Utilize all corporate channels for “the ask.”
- Make it personal. A personalized ask is best, particularly from a friend or colleague. Utilize personal connections and knowledge in emails and communications.
- Start off with people who already give. Their participation will build momentum.

## 5. **THANK: Recognize everyone’s contribution to the campaign, not just their donation**

- **You can’t thank them enough.** Say “thank you” when you pick up pledge cards and send out thank you emails.
- **Send a CEO communication.** Draft a thank you message for your CEO to send to all employees who participated in your campaign. Whether it’s an email, intranet announcement or keepsake letter, the CEO’s support can be key to success.
- **Celebrate with a thank you event.** It can be part of another company gathering or an event all on its own. Either is a great opportunity to publicly honor participants, highlight results and showcase year-round engagement opportunities.

*Stay connected  
year-round!*

Opportunities to stay connected don’t end when your campaign does. Let your colleagues know about ongoing, year-round opportunities to volunteer in the community or participate in United Way initiatives.



# WORKPLACE CAMPAIGN 101

New to United Way campaigns? This page is for you. Since 1942, local businesses have been achieving their local philanthropic goals by giving back through United Way workplace campaigns. Why?

## Because United Way works.

United Way of South Wood & Adams Counties is focused on changing and strengthening lives in our community. We mobilize our community in the areas of: Education, Financial Stability, Health and Safety Net Services by supporting partner programs, community coalitions, and initiatives; providing 211 and Volunteer Center programs; and creating collaborative partnerships within our community.

## Because giving to United Way is easy.

Most people give via payroll deduction, pledging to have a certain amount taken out of each paycheck. United Way's materials are easy to distribute and collect. United Way is dedicated to making your year-round engagement efforts easy. Our job is to make you look good.

## Because there's something for everyone.

Donors can choose to give their gifts to United Way of South Wood & Adams Counties or to the United Ways in their home communities all over the United States.

## Because United Way is effective. Money raised here stays here.

Dollars raised in south Wood County support programs in south Wood County. Dollars raised in Adams County support programs in Adams County.

### When you invest in the community through United Way:

- **YOU CARE** about removing barriers for neighbors, friends, and family members facing issues in education, financial stability, health and safety net services.
- **YOU TRUST** the money you contribute to United Way will be allocated to programs that are held to the highest standards. Our Partner Programs provide continual reporting that assure the dollars raised are doing the most good for our local community members in need.
- **YOU UNDERSTAND** that all the money raised by United Way of South Wood & Adams Counties stays right here in our area, helping to make our community an even better place to live for everyone in south Wood and Adams Counties.
- **YOU KNOW** that any of us could benefit from our partner program services at any time. These programs are not just for the "other guy." Our partner programs serve a broad spectrum of the population who just need help getting through a tough time. In fact, one out of every four people living here benefit from the services of United Way of South Wood & Adams Counties.
- **YOU APPRECIATE** that United Way collaborates with the community. United Way works with businesses, faith-based organizations, local government, other non-profits, and many community groups to build the infrastructure we need to proactively tackle our community's biggest challenges.



# UWSWAC “ELEVATOR SPEECH” LANGUAGE

Each option contains active, strong language you can use to tell someone what United Way is. Choose the one that sounds best to you as a base for your own speech. Your United Way experience makes you our best advocate, so be sure to add your own “why I got involved” moment. If you have more time, add a little detail from the bullets below.

Your elevator speech isn’t meant to tell someone EVERYTHING that we do, but if you deliver it with passion, that person might just ask to hear more!

## OPTION A:

Giving to United Way is making an investment in the health of our community.

When you give, you become a partner in south Wood & Adams Counties.

We make your dollars work smarter.

We find partners who are experts in helping and who believe in collaboration and accountability for measurable results.

We make the community stronger together.

Live Your Purpose.

## OPTION B:

United Way makes your dollar work smarter for everyone in our community.

We help partner programs that are already good service providers become members of a collective impact movement.

When we work together for the same things, we can make bigger changes than any one of us could on our own.

Our partner programs commit to collaboration. They measure their impact and change course when necessary. And they are accountable when they spend your investment.

## OPTION C:

The simplest answer is:

United Way’s work makes our community stronger.

We work to provide access to basic needs for everyone so that every community member can thrive.

United Way provides a free referral service called 211 that operates 24/7 and can help anyone with questions about mental health, addiction, food, housing, childcare, etc.

- **YOU STRETCH** your donation dollars when you give to United Way. Our partner programs have resources that can make a dollar go a lot farther than an individual can.
- **YOU FEEL** good! Investing in our community gives you satisfaction and confidence knowing that you personally are helping to sustain and improve the lives of your friends, neighbors, co-workers, and maybe even your own family members.
- **YOU ARE** a part of real solutions. United Way is interested in more than “Band-Aid solutions” we know that long-term community impact comes from forward-looking and thoughtful planning.
- **YOU MATTER** to United Way and to our community and that is the bottom line. Whether you give time or money, you are what matters to this community the most.
- **YOU CAN** deduct your qualifying donations on your personal and business taxes.



# CAMPAIGN TIMELINE

## 8 WEEKS BEFORE KICKOFF

## NOTES

- Meet with your United Way Representative to review past campaign results and explore upcoming campaign themes and materials.
- Develop campaign goals and identify opportunities and challenges.
- Draft strategies to meet these goals and improve on last years results.
- Determine company pledge entry method:
  - Digital Giving
  - Paper Pledge Forms
  - Both
- Determine campaign start and end dates. The most effective campaigns are best kept 1-2 weeks. Starting & ending a campaign with a clear kickoff & wrap up are important factors when creating a time frame.
- Meet with your CEO or Senior Manager to gain their support for the campaign. Discuss corporate match and/or gift.
- Review and approve your budget.
- Recruit a campaign team representing key departments and all levels of your company. Educate your team members on United Way's role in the community.

## 6 WEEKS BEFORE KICKOFF

## NOTES

- Finalize goals and strategies with your CEO and campaign team.
- Lay out campaign plan (dates, theme, events and incentives) see page 12.
- Assign tasks to your team (communication, events, coordination)

## 4 WEEKS BEFORE KICKOFF

## NOTES

- Notify United Way of the campaign materials and additional United Way resources you'll need.
- Schedule group impact projects and workplace presentations with United Way.





## 2 WEEKS BEFORE KICKOFF

## NOTES

- Create energy and awareness. Begin publicizing your campaign. (Utilize your company's preferred channels of communication)
- Begin your Leadership recruitment. Talk to United Way on Leadership Giving.
- Prepare your CEO video, email or letter to your employees.

## 1 WEEK BEFORE KICKOFF

## NOTES

- Send CEO video, email or letter to your employees.
- Review event kickoff with your campaign team.
- Continue publicizing your campaign.

## KICKOFF WEEK

## NOTES

- Host your company-wide campaign kickoff event.
- Present information about United Way to all employees in presentations and staff meetings. United Way would be happy to present, too!
- Distribute pledge forms to all employees (paper or e-pledge)
- Be available to your campaign team and employees to answer questions.
- Continue building awareness and growing enthusiasm.
- Track and report progress
  - Capture the excitement with lots of photos of employee engagement and participation.
- Thank your CEO for their support.
- Thank every employee for participating in the campaign.



*We are happy to work with you to make sure the message about your United Way campaign gets across to all of your employees. Please feel free to discuss your individual meeting needs with United Way or your Loaned Executive.*



# CAMPAIGN TIMELINE, CONTINUED

## CAMPAIGN WRAP-UP

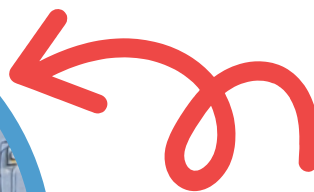
## NOTES

- Collect all pledge forms (for paper pledge campaigns) Ask your campaign team to follow up with colleagues who may not have their forms. Collecting forms from every individual, regardless of if they will donate, confirms that every employee had the opportunity to give.
- Announce your final campaign results.
- Thank every employee for their contribution, again (verbal recognition, letter, email, small gift, celebration event, etc.)
- Conduct a campaign debrief with your team and United Way. Develop a summary for next years campaign.

## YEAR ROUND

## NOTES

- Start a year-round communication program. Share United Way updates and news throughout the year to communicate the impact of their contribution.
- Subscribe to our United Way newsletter, follow us on social media to stay current.
- Participate in other United Way events and initiatives to increase employee engagement (Day of Caring, Great Book Giveaway, Stuff the Bus & More!)
- Promote your own internal special events for year round engagement (casual day, food events, volunteering activities, group impact projects, drives).
- Use New Hire and Retiree packets to engage new employees outside of campaign season and allow retirees to continue their involvement.



*Participate in volunteer opportunities year-round: [volunteerunitedway.org](http://volunteerunitedway.org)*

# MEETING GOALS

## Your Workplace Results Last Year

## Your Workplace Goals This Year

**Participation Goal %**

**Total GIVING employees**

(Multiply your total employees by your participation goal%)

**Set an "Average Gift" Goal**

**Total Employee Goal (Pledge forms)**

(Multiply your total GIVING employees by your "Average Gift")

**Corporate Giving**

**Other "Fun-raiser" or Special Events**

(OPTIONAL: Do not make these a priority over giving via pledge forms and payroll deduction)

**Total Workplace Campaign Goal**

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

**We LIVE Here.** | **We GIVE Here.** | **It STAYS Here.**



# INCENTIVES

So you've set your goals. Now to achieve them! Participation rates and average giving levels don't just magically increase. Here are some proven tips to boost them to the next level by engaging your team in United Way!

## When to use incentives

- Encourage first-time donors to make a gift
- Promote attendance at meetings or campaign events
- Persuade colleagues to turn in their pledge form by a certain date
- Encourage a pledge increase or leadership gift



## Incentives if you DO have a budget

- Candy
- Free food
- Vacation Time
- Celebration or department lunch
- Movie passes
- Gift certificates
- Tickets to local sporting events or theatre events
- Weekend getaways
- Salon/spa services
- Gas and car wash certificates

## Incentives if you DON'T have a budget

- Casual Day Stickers
- Prime parking spaces
- Pass for a long lunch
- Pass for a sleep in late day
- Company merchandise/apparel
- Potluck
- Traveling trophy for department with highest participation or percentage increase
- Car started & window scraped every day for a week
- Donated items or gift certificates from vendors or local merchants

*Need more ideas? Don't forget to ask United Way for some other fun, new ideas and sign up for Campaign Central e-blast!*



## Where to get incentives

- Your company
- Your vendors
- Local Businesses
- Managers or other employees
- United Way of South Wood & Adams Counties



# GLAD YOU ASKED

## Why give to United Way of South Wood & Adams Counties?

United Way is the most effective way to direct your charitable donations to address community needs of south Wood and Adams Counties. We connect resources to accelerate community-wide solutions. By bringing area non-profits, government, businesses and volunteers together, we improve people's lives by mobilizing the caring power of south Wood and Adams Counties.

## How does United Way establish its focus on community issues?

United Way of South Wood & Adams Counties engages stakeholders from throughout the community through surveys, community conversations, data and thoughtful discussion about where community investment dollars raised during the annual campaign will best be used. This establishes our Plan for Community Well-Being which is used to determine funding priorities.

## Why give to United Way? Why not directly to an agency?

- Charitable giving is a personal space and voluntary decision and United Way of South Wood & Adams Counties encourages you to do what is most comfortable to you. A gift to United Way of South Wood & Adams Counties is an investment that benefits the entire community, not just one program, issue, or population.
- There are many valuable non-profit organizations in the area that you may care about. United Way provides an opportunity for your one gift to support a variety of local needs. If everyone designated their gifts to their favorite agency, many services to those in need would not be available to the community. Through one gift to United Way, you can accomplish so much good!
- You can also be assured that your gift to United Way of South Wood & Adams Counties goes directly to fund programs that help people most in need. United Way conducts periodic needs assessments to ensure donor dollars are addressing the most pressing community needs. We also monitor funded programs and initiatives annually to make sure they are efficiently and effectively improving people's lives and making a positive impact.
- Finally, contributing through United Way guarantees agencies funds they can rely on every month rather than depending on sporadic contributions.

# UPCOMING EVENTS

## YEARLY TIMELINE:



September - Campaign Kick Off



October - Denim Day, McDonald's Day & Day of Caring

November - Sweepstakes Deadline



January - Thank You Celebration

February - 211 Day



# UPCOMING EVENTS CONTINUED...



March - Power of the Purse

April - Book Drive



June - Great Book Giveaway & United We Can



July/August - Stuff the Bus

August - Campaign Training



 *Please visit*

Our workplace campaign webpage for digital versions of all of our campaign resources.

# CONTACTS

## CAMPAIGN PRESENTATIONS

Tari Jahns  
tari@uwswac.org  
715-421-0390

## GENERAL CAMPAIGN & E-PLEDGE QUESTIONS

Stefanie Drexler  
stefanie@uwswac.org  
715-421-0390

## GROUP IMPACT PROJECTS & VOLUNTEER INFORMATION

Ben Eberlein  
ben@uwswac.org  
715-421-0390



**United Way of South  
Wood & Adams Counties**