



2019 Workplace Giving Coordinator Keys to Success



1. ENERGIZE

Recruit a strong team to lead your United Way Workplace Giving Campaign



2. INSPIRE

Share the United Way story with Employees



3. ENGAGE

Connect employees to our work and show them how they can ensure a better future for their community.



4. ASK

Ask everyone to give.



5. THANK

Thank everyone for giving.



ENERGIZE



SET A GOAL

Develop a campaign strategy that fits your company's size and culture, engaging everyone at all levels and across all departments.

- Consider prior year results, number of employees and current business climate.
- People like to see results! Showcase dollars raised in real time throughout the campaign.



RECRUIT YOUR TEAM

Before your kickoff, build a diverse team from all departments to help plan and track events throughout your company campaign. Divide duties:

- Communications
- Presentations
- Events



INVOLVE YOUR CEO

Your CEO can help champion the work and ensure a successful campaign. With your CEO:

- Establish a campaign timeline and budget. (Pick 2 weeks that work for you and end campaign by April 30th)
- Confirm your company's corporate gift.
- Kick off the campaign with a company-wide email from the CEO and have them make the first pledge.
- Host company-wide rallies and presentations with CEO appearances.



INSPIRE



HOST A CAMPAIGN KICKOFF

- Employee meetings or rallies are the most effective way to reach all employees and encourage them to invest in United Way. Rallies can take as little as 10 minutes.
- Distribute brochures and pledge cards as employees arrive.
- Ask a colleague who has benefited from a United Way program to share their experience.
- Ask your CEO to attend and publicly endorse the campaign.
- Keep the meeting lively, informative and fun.
- Make the ask!
- Follow up with employees who were not able to attend.



USE YOUR TOOLS

We have created several assets to communicate the value of United Way's work in our online toolkit at unitedwayontariocounty.org, including:

- Posters
- Sample letters
- Brochures



ENGAGE



EDUCATE COLLEAGUES

As the ambassador for United Way, you can help your colleagues understand the value of their gift.

- Prepare educational opportunities to share during your company-wide campaign kickoff, volunteer projects, rallies and partner agency tours.
- Use employee publications, intranet, voicemail, announcements, bulletin boards, email, management endorsement letters, newsletters, paycheck stuffers and social media to spread the United Way message.
- Encourage colleagues to follow us on Facebook and Instagram to stay updated.



INCREASE GIVING (LEADERSHIP GIVING)

Identify executives and/or employees giving \$500 or more. There are several strategies to enhance their giving experience through affinity group engagements:

- Hold a raffle for those who increase their gifts by a set percentage or dollar-per-week amount.
- Ask retirees to make a Planned Gift.
- Set an average gift goal for your company and incorporate an incentive.
- Hold a special leadership solicitation/recognition event.
- Include names of leadership donors on the intranet/ newsletter/etc. (with their permission).



INCENTIVIZE GIVING

There are several ways to energize your campaign and increase participation:

- Set participation rate as a company goal.
- Hold a raffle for everyone who donates (prime parking spots, days off, gift cards, etc.).
- Hold competitions between stores/branches/locations/ departments based on participation rate.
- Offer a casual dress day to everyone who donates.
- Offer an opportunity to win United Way swag.
- Host a wrap-up party and thank everyone who participated.



ASK



ASK EVERY ONE TO GIVE

The No. 1 reason people do not give is because they are not asked! So please ask everyone. United Way believes that giving is a personal decision. Make sure that everyone has the opportunity to give by supplying information about how United Way changes lives and how each contribution drives our mission forward. Start at the top – ask company leadership to set the example by making their contributions early. Remember to include off-site and remote employees and highlight corporate support, especially if your company has a program in place that matches employee donations.

You can make the ask:

- Personally
- At campaign events
- At staff meetings
- At leadership events
- Via email and social media



WAYS TO GIVE

- Payroll deduction (the easiest way to give)
- Cash/check
- Credit card
- Direct billing
- Stock donation
- Interested in automating your campaign? Ask about ePledge



THANK



MONITOR YOUR CAMPAIGN AND REPORT RESULTS

It is critical to follow up with employees and report results:

- Ensure that your campaign team had the opportunity to speak with all employees.
- Keep regular totals and give progress reports to your CEO, team, organization and your United Way staff contact.
- Publicize campaign results throughout the organization.
- Track contributions by asking all employees to return pledge cards to you (even if they do not make a gift).
- Make sure that pledge cards are filled out and signed and that the total amounts are accurate.
- Give completed report envelopes, including signed pledge forms to your United Way staff contact.



SAY THANK YOU!

- It is just as important to officially close the campaign and thank people as it is to begin the campaign.
- Thank employees for their participation, time and support individually through a CEO recognition letter.
- Recognize your team and others who volunteered their time.
- Publicize your results via email, voicemail, intranet, newsletters, social media, etc.
- Celebrate your success!