

UNITED WAY OF LANE COUNTY WORKPLACE CAMPAIGN HANDBOOK



Ensuring kids are successful in school and life.

unitedwaylane.org



United Way of Lane County

WORKPLACE CAMPAIGN HANDBOOK

Congratulations on being appointed Employee Campaign Leader (ECL) for your organization's annual United Way Giving Campaign! You were selected to be an Employee Campaign Leader because someone in your organization believes you are both capable and compassionate. As an ECL you are joining a select group of volunteers from across Lane County who are working together to help make our community a better place by engaging in the work of United Way. Together, the money we raise and the volunteers we engage will provide vital services to people in Lane County through United Way programs and initiatives.

We understand that your time is valuable, and will work with you to assure your campaign fits the unique culture of your organization. In this guide you'll find ideas for a successful and fun campaign that will engage your team through a combination of planning, employee participation, fun ideas and LOTS of heart.

Your success is vital to improving lives in our community. You are a valued member of the United Way team and we couldn't do this work without your support!

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If you need help, contact the United Way Resource Development Team

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WHY PARTNER WITH UNITED WAY OF LANE COUNTY?

- The mission of UWLC is to create opportunities for a better life for all. Our vision is to create a community where **all kids can be successful in school and life** because we believe healthy, successful kids are the best investment in our future.
- We're focused on reaching **four outcomes** shown to strongly impact the health, education, and financial stability of families to ensure that kids are successful in school and life:

Healthy, Stable Families: Providing tools that end the cycle of poverty so all kids have a home and nutritious food every day.

Kindergarten Readiness: Ensuring that kids have the early math, literacy, and social skills for a successful start.

Elementary School Success: Helping students reach essential reading benchmarks by third grade when they transition from learning to read and begin reading to learn.

Youth Pathways to Productivity: Providing youth with the knowledge, skills, and support necessary to reach their potential and pursue their dreams.

- **Our strategies for success:**

PLAN & ASSESS

We work to understand the needs in Lane County across all communities. We engage with thousands through community meetings, focus groups, surveys, and social media. We address topics from community health to education, financial stability to safety. We then work with our partners to develop plans to achieve our goals, which sets the stage for our investment priorities. Finally, we establish success metrics to make sure we continue to make lives better for people in Lane County.

RAISE FUNDS AND INVEST IN THE COMMUNITY

We raise and invest millions of dollars across Lane County each year through our community campaign, individual donations, and grants. These funds go right back into our community to support high-quality, effective programs that positively impact the lives of kids and families. In recent years, our successful investments have allowed us to nearly double our revenue through grants and awards, bringing more dollars to Lane County from outside the community, and making your donation go even further to support the work that improves lives!

MOBILIZE PEOPLE TO ACTION

We strive to inspire action through volunteerism, community engagement, and financial contributions. From non-profits and government agencies to business leaders and community volunteers, we invite everyone to the table to work toward our shared vision of a community where all kids are successful in school and life. There are many ways to get involved to help your community whether it's through giving time, money, expertise, or support. No matter how you choose to give, advocate, or volunteer, your contribution matters.

MEASURE RESULTS

We strive to provide accountability to our donors and our community by measuring and sharing the impact of our investments. To do this, we track key indicators to understand and monitor the success of our work. We have brought together researchers from leading institutions to help us design a plan that will help evaluate the effectiveness of our investments and the impact of our work over time. This, in turn, will help us ensure that we are always maximizing the support of our donors and community and offering the best programs possible.

FREQUENTLY ASKED QUESTIONS

WHAT IS A WORKPLACE CAMPAIGN?

UWLC holds workplace campaigns at small businesses, government offices, nonprofit agencies, and large corporations in a variety of industries. These campaigns are a significant part of our fundraising activities and a great way to help build staff morale, promote teamwork, enhance your company's reputation, and engage your team with important work that is improving our community.

A campaign gives employees the opportunity to make charitable contributions through payroll deduction—an easy, affordable, and convenient way to give. During the campaign, you and your leadership encourage employees to help people in our community by volunteering with and/or donating to UWLC.

HOW MUCH TIME DOES IT TAKE TO RUN A CAMPAIGN?

That depends on you and your organization. Some campaigns run a day or two, while others may span two weeks or more. The decision may depend on your corporate headquarters, your local leadership—or it may be up to you. The key is balancing effort and resources. Two weeks is often the perfect amount of time to kick-off your campaign, get your message out effectively and ask everyone to give—all while keeping energy and interest high. But running a successful campaign takes planning, and that's where this workbook comes in.

HOW CAN I RUN A WORKPLACE CAMPAIGN VIRTUALLY?

Because of the COVID-19 pandemic, we've adapted our campaign outreach, resources, and format to meet organizations and employees where they are, and for many, that's online! Our staff are prepared to offer presentations to your employees virtually; we're creating videos highlighting our work; we've created "off-the-shelf" virtual special events you can use to engage your employees, and we offer E-Pledge—a platform to collect pledges electronically, eliminating the need to meet in-person or complete forms by hand (fillable PDF pledge forms are also available). Please talk with United Way staff to develop the best plan for your company.

WILL I HAVE HELP?

Yes. Your United Way Resource Development Manager, and potentially a Loaned Executive (LE) will help you prepare, plan, promote, launch, and celebrate your campaign. Resource Development Managers are United Way staff and are available to assist you year-round with campaign planning, volunteer activities, and community involvement. An LE is loaned by an organization to United Way to assist you during your campaign. You should also check in with past Employee Campaign Leaders and your executive leadership.

ARE EMPLOYEES REQUIRED TO GIVE?

Making a gift to United Way is never mandatory; it is an invitation to be a part of our work of creating a community where all kids can thrive, an invitation we hope employees and families consider thoughtfully.

FREQUENTLY ASKED QUESTIONS (CONT.)

WHEN SHOULD OUR CAMPAIGN TAKE PLACE?

Most workplace campaigns occur between early September and mid-December; however, they can take place any time of the year. It depends on what works best for your company. Work with your United Way Representative to determine a good timeline.

HOW LONG SHOULD OUR CAMPAIGN LAST?

Most campaigns can be wrapped up in two or three weeks. The goal is to make the appeal while the United Way message is still fresh in employees' minds.

WHERE DOES MY DONATION GO?

Your donation is invested directly in local programs and initiatives collectively working to ensure all kids are successful in school and life—programs addressing hunger, housing and homelessness, mental and behavioral health, early education, parenting support, and creating pathways for youth to thrive. Beyond these strategic investments, your donation also ensures United Way can continue to assess community needs, bring together strategic partnerships, leverage resources, and mobilize volunteers—supporting the work of creating real, lasting change. minds.

WHEN DO PAYROLL CONTRIBUTIONS START?

The most common payroll contribution period usually runs from January 1 through December 31. Some companies use their fiscal year as their schedule for payroll contribution. United Way does not set your payroll schedule; it is a company decision.

WHAT RESOURCES DOES UNITED WAY OFFER TO HELP RUN OUR CAMPAIGN?

Your United Way Representative is happy to make a presentation to you staff, share videos and stories, and provide ideas for special events and activities you can run virtually at your workplace.

WHAT IF QUESTIONS ARISE THAT I DON'T HAVE ANSWERS FOR?

Please encourage employees to contact your United Way Representative directly with any questions or assistance they might need. You should not feel pressured to answer a question you don't have an answer for, your representative is there to help.

CAMPAIGN PLANNING

The Campaign Planning Guide in Section 3 is based on campaign best practices, and will walk you through the necessary steps to manage a successful campaign. Some suggestions may work well for your work environment while others may not.

Items marked with an asterisk indicate required components of this process.

SECTION 3 | CAMPAIGN PLANNING

BEFORE THE CAMPAIGN (IDEALLY 4-6 WEEKS BEFORE CAMPAIGN KICKOFF)

Target Date

<input type="checkbox"/>	*Attend the Employee Campaign Leader training (live or recorded).	
<input type="checkbox"/>	*Meet with your CEO and top level leadership to ensure you have the proper support; Confirm if leadership will have an active role in the campaign.	
<input type="checkbox"/>	Ask leadership about a corporate gift. Matching employee giving can be a great incentive! Will there be a corporate gift? Yes/No Will there be an employee match? Yes/No	
<input type="checkbox"/>	*Determine your budget \$ _____	
<input type="checkbox"/>	*Meet with your United Way of Lane County representative	
<input type="checkbox"/>	Recruit and train your campaign team.	
<input type="checkbox"/>	*Determine your goals. Review last year's campaign date and establish goals for participation, funds raised: Corporate Giving \$ _____ Employee Giving \$ _____ Employee Participation _____ % Donors giving \$1,000+ _____	
<input type="checkbox"/>	Personalize your campaign	
<input type="checkbox"/>	Determine incentives: will there be incentives to encourage employee participation?	
<input type="checkbox"/>	Schedule your United Way presentation for employees Date/Time: _____ Speaker: _____ Format/venue: _____	
<input type="checkbox"/>	*Determine how you will collect pledges. Using E-Pledge is highly encouraged- a simple, electronic way to communicate about campaign and collect pledge forms. Please notify UW at least four weeks before your kickoff to set this up. If unable to collect pledges electronically, digital and paper pledge forms can be made available. E-Pledge? Yes/No Dates to send (2 reminders recommended): _____ Paper pledge cards? Yes/No How many?: _____ Date needed: _____	

SECTION 3 | CAMPAIGN PLANNING

DURING THE CAMPAIGN

Target Date

<input type="checkbox"/> *Hold your campaign kickoff: Date/Time: _____ Venue/format: _____	
<input type="checkbox"/> *Invite your CEO/executive management to share why they support the campaign.	
<input type="checkbox"/> Host your speaker from United Way of Lane County.	
<input type="checkbox"/> *Arrange to have photos taken , to share with United Way and post on your organization’s social media platforms.	
<input type="checkbox"/> *Share instructions for how to give and the campaign timeline. How are you distributing pledge cards? Will there be additional presentations? When will they receive e-pledge email? When is last day to donate? Are there activities/special events? Who should be contacted with questions?	
<input type="checkbox"/> Check your progress regularly and send out reminders.	
<input type="checkbox"/> Schedule a mid-campaign meeting with your team to monitor results.	
<input type="checkbox"/> Reach out to staff that were unable to attend meetings.	
<input type="checkbox"/> *Send out reminders about your campaign progress and end date.	
<input type="checkbox"/> Include campaign photos and results in your updates (email, e-newsletter, intranet, website, social etc.)	

HAVE FUN!

Build community and engage your colleagues.

SECTION 3 | CAMPAIGN PLANNING

AFTER THE CAMPAIGN

Target Date

***If using E-Pledge, please obtain pledge report from UW representative. If using paper pledge cards, please send to your UW rep.**

***Thank everyone who participated for the difference they are making in our community.**

Send an e-mail from you and/or your CEO to thank every employee.

Write a thank you letter for your company's newsletter or intranet.

Include a thank you note with paychecks.

Schedule a thank you event or celebration as a way to report results and convey gratitude.

Encourage employees to sign up for United Way's eNews and connect with us on social media to stay engaged and informed.

Share your results with your employees and your community.

Include campaign photos and results in your wrap up communications (wrap-up email, e-newsletter, intranet, website, social media etc).

Send survey link to staff to give United Way feedback on the campaign.

***Schedule a debrief meeting with your United Way team** to document your success and discuss lessons learned.

Document your notes for future campaigns.

Resources for your campaign can be found at:
www.unitedwaylane.org/workplace-campaign

Below are a few resources and ideas for planning a successful campaign. Be sure to meet with and update your UW representative with any questions and to communicate your campaign plans.

INCENTIVES

Your organization may want to encourage participation by offering incentives for first-time gifts, increases in current gifts, or hold drawings for everyone. Customize this to your organization's culture.

Sample incentives could include:

- Paid time off
- A reserved parking lot spot
- Gift certificates for restaurants, movies, spas, or retail stores
- Raffle for free coffee or lunch for a week sponsored by the manager/CEO
- A company logo jacket, coffee cup, or other branded item
- If your organization hits a participation goal, your leadership team will dress up or do a funny dance during a staff meeting

SPECIAL EVENTS

Even though many organizations are working remotely these days, there are still fun ways to engage colleagues virtually in your campaign.

“Off-The-Shelf” Ideas: United Way has created a few pre-planned activities and events - contact your UW representative if you'd like either of the following:

- Trivia: United Way + Your Company: includes sample questions and instructions for hosting virtually
- Pay It Forward Campaign: encourages staff to recognize and affirm colleagues for work well done and promote culture of gratitude

Other ideas:

- 21-Day Equity Challenge
- “Minute to Win It” Challenges
- Talent Show
- Guess Who?
- Virtual Balloon Pop
- #nailedit Challenge
- Lip Sync Battle
- Pumpkin Decorating

LETTER EXAMPLES TO INCLUDE:

Upper level support is the best foundation for a United Way campaign. The following are example communications (letter, email, etc.) that may be used by your CEO, Labor Leader, Superintendent, or Campaign Manager throughout your United Way Campaign. If you prefer to write your own we encourage you to do so, and we are here to assist you if needed. This can help you get started:

CEO Campaign Endorsement Letter

Dear (employee name),

We at (company name) know everyone has to do their part to make Lane County a better place to live and work. That's why we're a proud supporter of United Way of Lane County. We know that we are stronger when we collaborate and work together.

We have all been impacted, in large and small ways, by the COVID-19 pandemic. We also all have an opportunity to be a part of the the recovery and rebuilding of our communities, and help reimagine a more just and resilient future for Lane County.

United Way of Lane County is helping lead this work. Together, they partner collaboratively with community partners, leveraging resources, relationships, and expertise to create opportunities for a better life for Lane County's most vulnerable residents. Now more than ever, our families, neighbors, and friends need our support.

By giving to United Way, we can be a part of the solution.

I sincerely hope that you'll join me in support this year's United Way Campaign. Imagine the impact we can make together. Because together we can accomplish more than any of us could alone!

Sincerely,

CEO Thank you Letter

Dear (employee name),

Thank you for your 2020 gift to United Way of Lane County. Your contribution will help make the community stronger and shows the real spirit of living united. The generosity of our employees will enable United Way to help thousands of children and families achieve their full potential and lead healthy productive lives. Through your participation in our company's campaign you have helped unite us in our effort to make a real and lasting difference in our community. Your gift brings hope and opportunity to the lives of thousands in Lane County.

Your tremendous spirit and compassion for our neighbors empowers us to accomplish great things together. On behalf of United Way, thank you for your generous support and investment in building a brighter future for all of us!

Sincerely,