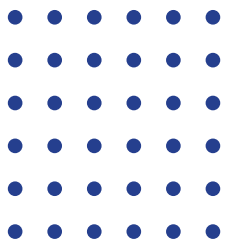




United Way of Greater
Richmond & Petersburg

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CAMPAIGN GUIDE



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A Message from James Taylor, President & CEO



Dear Employee Campaign Manager,

Thank you for volunteering your time to serve as your company’s Employee Campaign Manager (ECM) for the 2019-20 United Way of Greater Richmond & Petersburg campaign. If you have served in this role before, thank you for your continued work! If you are a first time ECM, welcome!

By leading your organization’s campaign to support United Way of Greater Richmond & Petersburg, you are spearheading the effort to collectively improve the region for everyone that lives here. Your company’s campaign will make a difference in the lives of individuals and families across our region. We are truly grateful for your service and commitment to this role.

This guide, along with resources on our website and the support and guidance from United Way staff, will help make your 2019-20 campaign smooth, successful and fun.

Again, thank you for your leadership. Now, let’s get started!

Sincerely,

A handwritten signature in blue ink that reads "James".

James L.M. Taylor

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IMPORTANT NOTE:

We are here to help make your campaign a success. Please contact your United Way representative for assistance in planning and executing any of the ideas in this guide.



United Way of Greater Richmond & Petersburg

2001 Maywill Street, Suite 201
Richmond, VA 23230
www.yourunitedway.org

What We Do

We empower individuals and drive systemic change to provide everyone with a clear path to success.

We do this by mobilizing the entire community – individuals, nonprofits, government agencies, schools and businesses alike – to collectively tackle our region’s toughest challenges.

Research

As a major regional funding organization, United Way is uniquely qualified to provide critical information to community leaders and organizations. We have a dedicated research team that studies local data to track problems in our communities and works with partner organizations to develop solutions that actually move the needle.

Convening

United Way serves as the central convener of our region’s nonprofits and local governments, businesses, schools and volunteers. We identify areas of need and bring together leaders from all sectors to drive positive change in communities across the region.

Funding

United Way is one of the largest nonprofit funding organizations in the region. We invest in dozens of fantastic nonprofit agencies doing critical work in communities throughout our service area. We use our *Steps to Success* framework to guide funding decisions and ensure dollars go to organizations and programs working in each of our nine key areas.

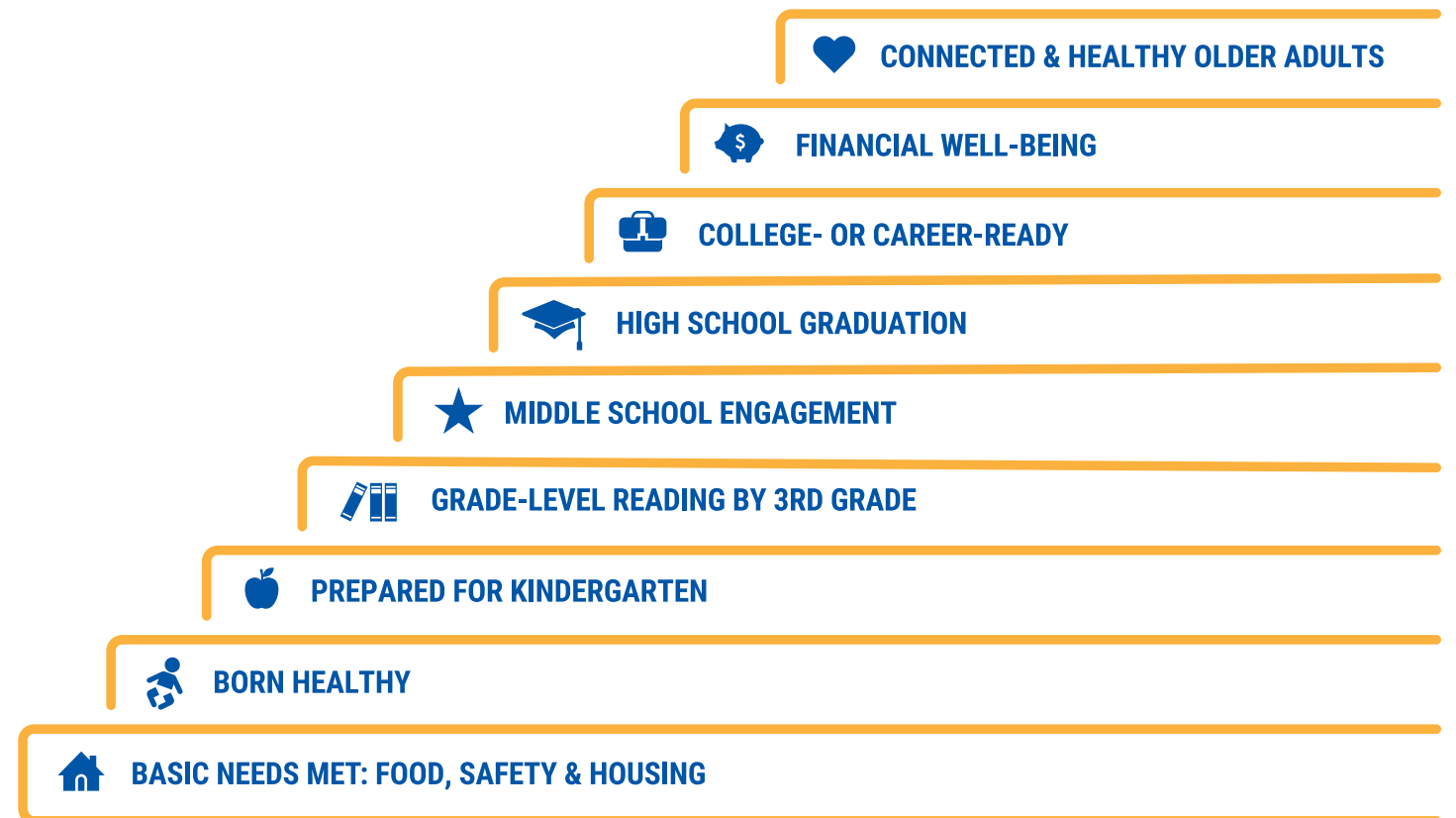
Empowerment

United Way connects individuals with knowledge, resources and volunteer opportunities to help them positively impact their lives as well as the lives of their family members, friends and neighbors.



STEPS TO SUCCESS

We empower individuals and address systemic problems to provide everyone with a clear path to success.



Your Workplace Campaign Matters

Whether you're at a small business, a major corporation or even a nonprofit organization, you can join the hundreds of local businesses and organizations that support United Way of Greater Richmond & Petersburg with workplace campaigns each year.



Each campaign should be different and intentionally tailored to your organization's unique culture and identity. Setting up and running a campaign is simple, and we can help you every step of the way.



United Way's workplace campaigns are:

Good for your employees.

Workplace campaigns are a fun and convenient way for employees to have a significant impact on their community without a significant impact on their wallet.

Good for your company.

Partnering with United Way of Greater Richmond & Petersburg is a clear statement that your organization is committed to helping everyone in our community and reinforces your reputation as a good corporate citizen.

Good for your community.

By raising money that stays here in Greater Richmond and Petersburg, you're improving the lives of people right in your backyard and addressing a variety of challenges through one strategic partnership.

How to Run a Workplace Campaign



IMPORTANT NOTE: We are here to help make your campaign a success. Please contact your United Way representative for assistance in planning and executing any of the ideas in this guide.

It is important to know what you need to do before jumping into a campaign. By having time to prepare, you can work with United Way staff and fellow colleagues to make your campaign a success. Below we have first steps and tips for how to tell the United Way story, recruit your team and develop a campaign timeline. Remember, not everything will fit your needs, but this will be a good place to start.

Talk with United Way.

We are here to help! The most effective ECMs know United Way and are readily able to share information about our work with their colleagues. We would love to get you up to speed on our newest initiatives, as well as talk about campaign ideas and best practices. Speak with your United Way representative to learn all about United Way and our work. We are always available for trainings, brainstorming and more.

Secure support from top-level management.

The most successful campaigns have strong support from senior leadership. Meet with your organization's executives and confirm their support for your campaign. Map out any places where you'll need their specific involvement, such as sending an email from the CEO to kick off the campaign. Make sure they know about campaign dates and goals, and be sure to ask about any corporate gifts or company matching programs for employee gifts.

Recruit your team.

Create a team that is large enough to help you manage your campaign. Ideally, campaign teams should include employees from a variety of levels and departments. This will not only lighten your workload, but will increase involvement and awareness across the organization.

Organize a leadership giving program.

Learn more about United Way's Leadership Circle and Alexis de Tocqueville Society. United Way has dedicated leadership giving staff available to help brainstorm ideas for soliciting leadership gifts. Recruit a Leadership Chair to your team so you have someone who is 100 percent focused on leadership giving.

Set a campaign goal.

Employees want to have something to strive for, so set a campaign goal for your company! If you ran a campaign in previous years, look at the numbers and think about what you can achieve. You and your team will feel great when you reach your goal. Ask senior leaders if you can offer incentives to employees for hitting the goal (e.g. a company happy hour or pizza lunch).

Understanding your Role as Employee Campaign Manager

As an employee campaign manager, your role is to plan, coordinate, delegate and implement a successful United Way campaign for your colleagues.

As the ECM you are responsible for:

- Developing a campaign timeline with your United Way representative.
- Serving as an organization-wide leader of your campaign.
- Coordinating the overall execution of the campaign plan.
- Arranging all campaign meetings.
- Monitoring and reporting campaign results in a timely and accurate manner.
- Working with your campaign team to ensure everyone understands their roles.
- Thanking all colleagues who become involved with the campaign.
- Evaluating your campaign and making recommendations or plans for next year's effort.

IMPORTANT NOTE:

Being an ECM is an important responsibility, but you are not in it alone. United Way representatives are available to work side-by-side with you to make your campaign a success.



Recruiting Your Campaign Team

A team of campaign volunteers will not only make your job easier, but it will also increase the success of your campaign. The size of your team depends on the size of your organization. We have suggested some roles and responsibilities below, but remember that you have the ability to add or remove based on what will be best for your campaign.

Communications Coordinator

- Develops campaign communication timeline.
- Works with United Way team to develop talking points, find communication resources and plan for any speakers.
- Identifies internal opportunities for year-round communications.

Tocqueville Ambassador

- Works with ECM to provide communication to current and prospective Alexis de Tocqueville Society members.
- Plans any events that will be for Alexis de Tocqueville Society members.

Leadership Circle Ambassador

- Works with ECM to provide communication to current and prospective Leadership Circle Society members.
- Plans any events that will be for Leadership Circle Society members.

Senior Executive Campaign Chair

- Provides executive-level support for the campaign.
- Works to increase corporate gift or matching gifts.
- Encourages employees to give through the campaign.

Volunteer Coordinator

- Works with United Way team to identify and promote United Way volunteer opportunities that fit within the planning timeframe, budget and other company-specific parameters.
- Coordinates logistics with United Way team and serves as an on-site contact at volunteer events.



How to Tell Our Story

United Way of Greater Richmond & Petersburg does many different things in the region. It can be tough to succinctly explain why it is so important for colleagues to support the campaign. We have included key points below that will help you quickly describe United Way to your colleagues.

Of course, your United Way representative is available to help plan and execute presentations and provide messaging support. Don't be afraid to ask for help!

The Need:

Today, many residents of Greater Richmond and Petersburg struggle because of a lack of education or needed job skills, financial emergencies or the inability to access quality health care.

Who We Are:

United Way of Greater Richmond & Petersburg is a local member of a worldwide network, which means we leverage large-scale vision with an exclusive focus on the Greater Richmond and Petersburg region.

What We Do:

We empower individuals and drive systemic change to provide everyone with a clear path to success. We do this by mobilizing the entire community -- individuals, nonprofits, schools, government agencies and businesses alike -- to collectively tackle our region's toughest challenges.

The Vision:

By supporting United Way of Greater Richmond & Petersburg, you are joining the effort to collectively improve the region for everyone who lives here. The challenges are many and success won't come easy, but together we can drive real change.

Want to get more specific about what we do? Use the flyer on page 9! You may download and print this flyer from YourUnitedWay.org/get-involved/workplace-campaigns/campaign-resources.



WHAT DOES UNITED WAY OF GREATER RICHMOND & PETERSBURG DO?

We empower individuals and drive systemic change to provide everyone with a clear path to success. United Way of Greater Richmond & Petersburg serves the region's neighborhoods and rural areas alike – 11 different localities in all.

We do the research

We have a dedicated research team that studies local data to track problems in our communities and works with partner organizations to develop solutions that actually move the needle.

We fund local nonprofits

We know that we cannot tackle these issues alone. As a major regional funding organization, we support a network of 40+ nonprofit agencies in the area. To see the full list, visit yourunitedway.org/what-we-do/our-partners.

We tackle the issues

We identify areas of need and bring together local governments, businesses, schools and volunteers to drive positive change in communities across the region.

We empower individuals

We connect individuals with knowledge and resources to help them positively impact their lives as well as the lives of their family members, friends and neighbors.

We bring together volunteers

Whether it's distributing literacy kits to young students or spending time with older adults to combat social isolation, we bring volunteers together to improve our region.

We lead programs that make a difference

We run a variety of programs that fix systemic problems and provide direct support to families and individuals.

PROGRAM SPOTLIGHT



GRADE-LEVEL READING BY THIRD GRADE

Greater Richmond Campaign for Grade-Level Reading

Up to third grade, kids learn to read. After third grade, they read to learn. The Campaign for Grade-Level Reading is focused on increasing 3rd grade reading proficiency across the Greater Richmond and Petersburg region.



MIDDLE SCHOOL ENGAGEMENT

Youth Program Quality Intervention

Together with VCU's Mary and Frances Youth Center, we run the Richmond Youth Program Quality Intervention, which ensures out-of-school time programs make students feel safe, engaged and empowered.



FINANCIAL WELL-BEING

United Way Volunteer Income Tax Assistance Program

Our Volunteer Income Tax Assistance program provides free tax assistance for low- to moderate-income families and individuals. This program promotes financial well-being and gives everyone the chance to achieve wealth equity in our community.

Your Donation Makes A Difference

Your gift to United Way of Greater Richmond & Petersburg makes a difference in the lives of those who need it most.

\$1 /wk	PROVIDES	three literacy kits to kindergarteners in schools in areas of need across the region
\$3 /wk	PROVIDES	financial literacy classes, employment assistance and budgeting skill development for 474 students and individuals
\$10 /wk	PROVIDES	free tax prep to three families, maximizing refunds and keeping thousands of dollars in our community
\$25 /wk	PROVIDES	high quality out-of-school time programs for 500 youth
\$50 /wk	PROVIDES	one month of adult day care services for two older adults in a safe, nurturing environment



To make a donation, get involved or learn more about our community, please visit www.yourunitedway.org

Campaign Plan and Timeline

12 weeks	<ul style="list-style-type: none"> <input type="checkbox"/> Plan your campaign with United Way. Determine start and end dates, map out any events and set your fundraising goals. <input type="checkbox"/> Look over notes from past campaigns (if available) or meet with previous ECMs to review challenges and successes. 	<ul style="list-style-type: none"> <input type="checkbox"/> Recruit additional campaign committee members. <input type="checkbox"/> Brief senior executive leadership and choose Tocqueville and Leadership Circle Ambassadors.
10 weeks	<ul style="list-style-type: none"> <input type="checkbox"/> Finalize your organization's campaign committee. 	<ul style="list-style-type: none"> <input type="checkbox"/> Begin regular United Way team meetings.
8 weeks	<ul style="list-style-type: none"> <input type="checkbox"/> Finalize your United Way giving platform. <input type="checkbox"/> Develop Giving Community strategies and begin planning dedicated events for these groups. 	<ul style="list-style-type: none"> <input type="checkbox"/> Develop a campaign theme and calendar of events with United Way team. <input type="checkbox"/> Plan and recruit volunteers for volunteer opportunities.
6 weeks	<ul style="list-style-type: none"> <input type="checkbox"/> Develop a communication plan, making sure to check out United Way's available templates and other materials. <input type="checkbox"/> Finalize locations and plans for volunteer opportunities. 	<ul style="list-style-type: none"> <input type="checkbox"/> Let your United Way representative know if you would like someone from United Way or a supported organization to help tell the United Way story during your campaign.
4 weeks	<ul style="list-style-type: none"> <input type="checkbox"/> If you have not done so already, talk to your United Way representative about our latest work. Practice your presentation to colleagues so you are ready to tell the United Way story. 	<ul style="list-style-type: none"> <input type="checkbox"/> Send "preview" email about campaign kickoff and how employees can give.
2 weeks	<ul style="list-style-type: none"> <input type="checkbox"/> Host Leadership events. Talk with your United Way representative to see if this is something worthwhile for your organization. 	<ul style="list-style-type: none"> <input type="checkbox"/> Leadership ambassadors should follow up with any potential donors.
Launch	<ul style="list-style-type: none"> <input type="checkbox"/> Host kick-off event for all employees. <input type="checkbox"/> Throughout your campaign, make sure you are asking for your colleagues to pledge their gift to United Way. People won't give unless you ask! <input type="checkbox"/> Send initial pledge email and make sure you have a timeline to send reminders throughout the campaign. 	<ul style="list-style-type: none"> <input type="checkbox"/> Remind your team of your campaign goal and set check-ins to discuss updates throughout the campaign. <input type="checkbox"/> Continue educating employees, with help from the United Way team.



Campaign Spotlights:

Campaign Kick-Off

All campaigns are different. This means all kick-off events are different, you have the freedom to figure out what will work best for your organization. A good way to think of a kick-off is a company-wide event or meeting to educate, inspire support and have fun. Some large companies, like SunTrust, break up their kick-offs by department. Some smaller organizations, like Fulton Bank, host all-staff meetings in their board room and have light refreshments.

Things to think about when planning a campaign kick-off event:

What does your budget look like?

You do not want to start planning an event only to realize it is not financially feasible. Talk with your senior executive leadership about plans and budget first.

Are your employees interested?

A key factor in planning an event is to plan something fun and interesting for your employees. Participation by employees is what will make your kick-off a success. Know their interests, think about what would work best for your organization's culture and work from there to plan something tailored for your company.

What can you do?

Think about the logistics of an event. If you are at a large organization, think about how you can engage smaller sets of employees to keep them interested. If you are running your campaign at your busiest time of year, a kick-off event during work hours might not be the most productive. There are ways to have great kick-offs, large and small, but be aware of what is realistic.



SunTrust

SunTrust plans multiple outdoor kick-off events called Shine-Athlons, which serve as a fun and engaging way to kick off their employee giving campaign. At the Shine-Athlon, there are field-day style games, opportunities to learn about United Way, food trucks, raffles and much more!



GE Digital

GE Digital holds an Oktoberfest like event for their kick-off. They have games and beer that is served while also giving their United Way staff member an opportunity to talk to every one about what their money will go to.



Inspire

A key part of your campaign is talking about the work United Way does in your community. This will encourage your fellow employees to contribute to your company's campaign. Below you'll find ideas for how and when to promote United Way information to your colleagues.

Volunteer Opportunities

Engaging employees in volunteer opportunities will give them a connection to the work United Way does. If you are interested in setting up a volunteer opportunity for your organization, please contact your United Way representative.

Promotional Opportunities

We're here to help! United Way has ready-to-go materials for you to promote your campaign, including:

- Posters and flyers
- Template email messages
- Info sheets about our work in specific areas
- Pop-up banners
- And more!

Talk to your United Way representative for help locating these resources and putting them to use.

Custom Promotional Materials

Many companies like to develop their own materials to promote their campaign. We think that's great! Talk to your United Way representative to brainstorm ideas and see where we can be helpful.



Three Phases of Promotion:

Before Campaign:

- Share information about United Way's latest work. This can be done via email, during planning meetings, in the break room – anywhere!
- Thank prior year donors. It is important to acknowledge your employees that have given in previous years. Be sure to appreciate them leading up to the campaign kickoff.
- Share prior year results. By sharing prior year results and potentially sharing your campaign goal for this year, you are giving your employees something to work toward! If you would like help setting a goal, please speak with your United Way staff member.
- Share schedule of activities for upcoming campaign. This schedule will give your employees something to be excited for once the campaign starts.
- Send campaign preview email. ☁
- Have info sheets and campaign posters throughout the office. ☁

During Campaign:

- Send campaign kickoff email from your CEO. ☁
- Go over how to pledge.
- Send donation reminders. ☁
- Offer speakers from United Way or United Way funded agencies. This way, they can see who is doing the work and who is benefiting from the work.
- Inform about incentives or corporate matching gifts. If your senior leadership has matching programs or corporate gifts, it can make employees want to give more!
- Offer volunteer opportunities to your employees. Volunteer opportunities will make employees feel more connected to the United Way mission. Send last call reminder email. ☁

After Campaign:

- Highlight campaign results. It is good to be proud of all that your employees have raised! Share this number and be sure to thank everyone who contributed.
- Thank donors for contribution. You may want to host a breakfast for the donors or give them small gifts as a thank you. Whatever you decide to do, make sure you thank them!
- Send thank you email to your campaign team. ☁
- Send thank you email to donors on top of other thank you. ☁



These are all resources we have available on our website. If there is something that is not included here that you think would be useful for your campaign, let us know and we will see if we can come up with something to fit your needs.

Ask

People do not give if they are not asked. It is important that during your campaign you are asking your colleagues, whether that is in person, during kickoffs or through email, to give to United Way. Below is information about Giving Communities and tips for how to make “the ask.”

Talk about Giving Communities and Leadership levels.

United Way proudly leads Giving Communities made up of leaders committed to improving the Greater Richmond and Petersburg region.

ECMs should learn all about our Giving Communities and encourage employees at your company to consider making a donation at the level that is right for them.



ALEXIS DE TOCQUEVILLE SOCIETY

Recognizing donors giving \$10,000 or more annually



LEADERSHIP CIRCLE

Recognizing donors contributing \$1,000-\$9,999 annually

- **WOMEN UNITED**

Women United is a giving community for female members of United Way's Leadership Circle. Events are held throughout the year, providing members with the opportunity to network and learn about United Way's Steps to Success.

YOUNG LEADERS SOCIETY

Recognizing donors contributing \$250+ annually

Making the Ask

Talk to your United Way representative.

We are available to help come up with the best strategy for making your ask.

Get the donors' undivided attention.

Talk to your colleagues at a meeting or kick-off event and ask them to consider participating in the United Way campaign.

Tell the United Way story.

Come prepared with why people should give and the value United Way has in our community. Use the tips on page 8 to help prepare. If you would like to invite a United Way representative or someone from a United Way funded agency to tell the United Way story, please let us know at the beginning stages of planning your campaign and we can have someone ready.

Explain how to give.

As the ECM, you have the ability to decide which giving platform to use for your organization's campaign. There are a couple options to choose from. Keep in mind, if you work for a larger parent organization, your company may have already determined the giving platform to use. Check with your contact at the parent organization to learn more.

Address concerns and questions.

Know your materials and answer questions honestly. If you don't know, seek out your United Way representative to help answer questions. Not everyone will have the same questions or concerns, but make sure you are positive about finding answers to everyone's questions. We want everyone to be comfortable with their gift.

Additional Giving Options

Additional giving options, including gifts of securities and IRA charitable contributions are also available. Please contact our office to learn more.

Our two main giving platforms are:

PAPER. Employees fill out paper pledge forms and return them to you, the employee campaign manager. Your job is to collect pledge forms, make copies for the donor and your payroll department and deliver the original to United Way. Pledge forms can also be completed electronically using our fillable PDF.

E-PLEDGE SYSTEM.

E-Pledge is an online giving platform that allows employees to use a customized link to manage their donations.



Remember to thank top-level management support.

The most successful campaigns have strong buy-in from senior leadership. Thank them for their support of the campaign from start to finish. If they were able to secure corporate gifts or company matching programs, be sure to thank them for their leadership and contributions.

Remember to thank your campaign team.

Your team will have helped your company's campaign from start to finish. They were able to lighten your workload and increase involvement in the campaign. Thank them for their dedication and hard work.

Remember to thank all those who donated or participated in events.

At United Way, we are extremely grateful for every gift, large or small. Be sure to acknowledge each employee that donated, advocated or volunteered during your company's campaign.

Give United Way a chance to say thank you.

Share donor details so that United Way is able to include employees on thank you mailings and give them updated information about what we do throughout the year.

Donors who gave at Leadership levels are eligible for membership in the Young Leaders Society, Leadership Circle and Alexis de Tocqueville Society. These memberships include networking opportunities, luncheons, happy hours and more.

**Campaign Wrap-up**

After thanking your employees, there are a few things left to do.

Report Results

- During your company's campaign, collect all gift information.
- Look over paper pledge forms if possible to ensure everything looks correct.
- Schedule a time with United Way to pick up results and any materials that you used during the campaign.

Plan Ahead

Take a deep breath, then get a head start on planning for next year.

- Gather feedback about the campaign from senior leadership, campaign team and United Way representatives. Talk about what worked and what didn't work, and start a conversation about new and different ideas to try for next year.
- Save all relevant notes and resources in an easy-to-remember place for volunteers to use next year.
- Identify next year's ECM and make a formal introduction between the new ECM and United Way staff.

Keep Thinking

United Way has events and opportunities throughout the year, even when campaigns are not running! Here are some ways to stay involved and updated.

- Schedule quarterly meetings with your United Way representative to stay in the loop on all of our activities, so you are ready to hit the ground running when next year's campaign begins.
- Work with Human Resources to implement a new-hire program to give new employees the opportunity to contribute when they join the company. Ask your United Way representative for help and ideas on this front.
- Implement a year-round communications program that shares the impact of United Way's work. We send out regular communications about our work. If you aren't receiving emails and would like to, talk to your United Way representative and get added to our list!



FAQ

How long should a workplace campaign run?

The average campaign runs for one or two weeks, which is usually enough time to kick off your campaign, effectively promote United Way and make your ask without overwhelming your colleagues. An exception might be if you are the ECM at a very large or multi-site organization.

When should our workplace campaign take place?

Most campaigns run between August and November, but it can happen at any time that is best suited for your organization.

How can employees give?

United Way offers a number of options. Please connect with your United Way representative to discuss what will work best for your organization.

When does payroll deduction start?

Payroll deduction normally runs from January 1 through December 31. However, United Way does not set your payroll schedule; it is a decision made within your organization.

How do I work this into my schedule?

The best way to run a campaign without being too overworked is to recruit a committee and delegate. Work with your United Way representative and let them know your limitations, this way you can come up with a plan that fits both your organization's needs AND your busy calendar.

Can employees designate their donation?

As a service to donors, we make it possible to specify a program to receive your donation. However, the direct investment of your gift to United Way will do more in our region. Instead of addressing just one issue that an organization is solving, we have worked to figure out some of the biggest needs in our region and started addressing them.

Your dollars given directly to United Way enable us to do research about important issues in our region while also working with organizations that are making a difference in these areas.

**Thank you for running a campaign
to support United Way.**

*If you have questions, contact your United
Way representative or call (804) 771-5820.*



United Way of Greater
Richmond & Petersburg

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