



United Way of Greater  
Richmond & Petersburg

# WORKPLACE CAMPAIGN GUIDE 2022-2023



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## A MESSAGE FROM JAMES TAYLOR, PRESIDENT & CEO

**Dear Employee Campaign Manager,**

Thank you for committing to serve as your organization's Employee Campaign Manager (ECM) for your United Way of Greater Richmond & Petersburg Workplace Campaign. ECMs are some of the most dedicated volunteers, and we are so grateful for your leadership. No matter the size or specialization of your organization, you can run a successful campaign—one that benefits your organization, your colleagues and—most importantly—your community. United Way runs programs and invests in local nonprofits that help people in our region through every step of life, from basic needs like food and housing to education, financial stability and so much more. None of our work would be possible without partnerships with employers who understand the importance of supporting their local United Way.

Your role as an ECM is to help build a bridge between your workplace and our mission. You are responsible for leading and shaping your organization's Workplace Campaign to best fit your company and to have fun while doing it!

**Don't forget: We are here to help.** This guide, along with resources on our website and the support you will receive from United Way staff will help your campaign run smoothly, while making it fun and engaging for everyone involved.

Thank you again for your support of United Way of Greater Richmond & Petersburg's mission. Have a great campaign!

Sincerely,

James L.M. Taylor, President & CEO

# STEPS TO SUCCESS

hop  
toss  
shake wiggle

Get up and moving with your child.

Try this:

- Play hopscotch. Toss a small rock on one of the squares. Then hop over it.
- Wave your arms or tap your head as you hop.
- Call out a number and ask your child to stand on it. Take turns.

Find fun games like these will get children's bodies and brains moving.

Genworth United Way STEPS

CONNECTED & HEALTHY OLDER ADULTS

FINANCIAL WELL-BEING

COLLEGE- OR CAREER-READINESS

HIGH SCHOOL GRADUATION

MIDDLE SCHOOL ENGAGEMENT

THIRD GRADE READING

KINDERGARTEN READINESS

BORN HEALTHY

BASIC NEEDS: FOOD, SAFETY & HOUSING

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

# OUR REGION



We serve the region's neighborhoods and rural areas alike, providing direct services and support to 11 localities in all – the cities of Richmond, Petersburg and Colonial Heights and the counties of Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan. **When your colleagues donate to United Way of Greater Richmond & Petersburg, those dollars are invested right here at home.**



# YOUR WORKPLACE CAMPAIGN MAKES A DIFFERENCE

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

## UNITED WAY OF GREATER RICHMOND & PETERSBURG'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.

### 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.



**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.



# HOW TO RUN A WORKPLACE CAMPAIGN

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

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# 1

## PREPARE

The more you prepare, the more success you will have in your campaign. It's important to know what you need to do before you begin and identify areas in which you can lean on United Way staff for support.

### HOW TO GET STARTED

#### ✓ **Talk with United Way. We are here to help!**

The most effective ECMs work closely with United Way staff and are readily able to share information about United Way's local work with their colleagues. We would love to get you up-to-speed on our newest initiatives and help you come up with fun and engaging ideas for your campaign.

#### ✓ **Secure support from top-level management.**

The most successful campaigns have strong support from the highest levels of leadership. Meet with your senior leadership and confirm their support of the campaign. Map out any places where you'll need their specific involvement, such as having them send out an email to staff to encouragement supporting 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.

#### ✓ **Organize a leadership giving program.**

Learn more about United Way's flagship giving communities, our Leadership Circle and Alexis de Tocqueville Society. United Way has dedicated leadership giving staff available to help brainstorm ideas for soliciting gifts of \$1,000 or more. Recruit a Leadership and Tocqueville Chair to your team so you have someone who is 100% focused on these giving levels.

#### ✓ **Recruit your team.**

Create a team large enough to help you manage your campaign. Ideally, campaign teams should include employees from a variety of levels and departments. This will help lighten your workload and increase participation across the organization!

#### ✓ **Set a campaign goal.**

Your colleagues will likely want something to strive for, so set a goal for them to reach! If you ran a campaign in previous years, look at the numbers and think about what you can achieve. Ask senior leaders if you can offer incentives to employees for hitting the goal, such as a paid day off or catered celebration lunch.

#### 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.



# UNDERSTANDING YOUR ROLE AS EMPLOYEE CAMPAIGN MANAGER

As an ECM, 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 the 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

# GIVING COMMUNITIES AND LEADERSHIP LEVELS

United Way's Giving Communities are a great way to encourage employees at your company to consider donating at a leadership level that is right for them. Each group has a unique set of benefits. Learn more at [www.yourunitedway.org/giving-communities](http://www.yourunitedway.org/giving-communities).

## Alexis de Tocqueville Society

Recognizing donors giving \$10,000 or more annually



UNITED WAY  
TOCQUEVILLE SOCIETY

## Leadership Circle

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



United Way  
Leadership Circle

## Women United

Recognizing female donors giving \$1,000 or more annually



United Way  
WOMEN UNITED

## Always United

Recognizing donors giving in retirement and beyond



UNITED WAY  
Always United



## 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. Below are our suggested roles and responsibilities but remember – you can adjust based on what will work best for your campaign.

### Communications Coordinator

- Develops a campaign communications timeline
- Works with United Way representatives to develop talking points, find communications resources and plan for any speakers to attend any campaign events



### Tocqueville Ambassador

- Works with ECM to communicate with current and prospective Alexis de Tocqueville Society members
- Plans any events that are exclusive to this giving community



### Leadership Circle Ambassador

- Works with ECM to communicate with current and prospective Leadership Circle members
- Plans any events that are exclusive to this giving community

### 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 representative 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 representative and serves as an on-site contact at volunteer events

# SHARING UNITED WAY'S MISSION

United Way of Greater Richmond & Petersburg has a wide portfolio of work across our service area. It can be tough to succinctly explain why it is so important for your colleagues to support the campaign while helping them understand the impact their support has on our community. Here are some quick ways to share why donating to United Way matters.

## Make it personal.

Everyone has experienced adversity somewhere along the *Steps to Success*. Whether you or someone you know struggled in school, has dealt with financial hardships or had difficulties meeting their basic needs – these are all circumstances that arise as we move through life, particularly depending on the support systems we have in place.

Think about someone you know who may have struggled in one of these areas. Maybe your parents are getting older and thinking about their health? Or maybe you have a neighbor who recently lost their job and is struggling to stay afloat financially? These are examples that you can share to help make your presentation personal.

## Connect the dots.

United Way works directly across the *Steps to Success*. We lead several programs right here in Greater Richmond and Petersburg and we partner with agencies that fill in the gaps. That neighbor who is experiencing financial setbacks can benefit from having their taxes done at a United Way **Volunteer Income Tax Assistance** site. The older adult in your life can benefit from the direct services provided by a United Way funded program that helps them live independently and stay connected to their peers.

## Share the impact.

Without a unifying force in our community looking at the data behind these issues, developing solutions and ensuring donor dollars are spent effectively, many people in our region would not receive the help they need. United Way is here to support and uplift those who need help the most and it starts when each donor decides to give to this important work.



# OUR IMPACT



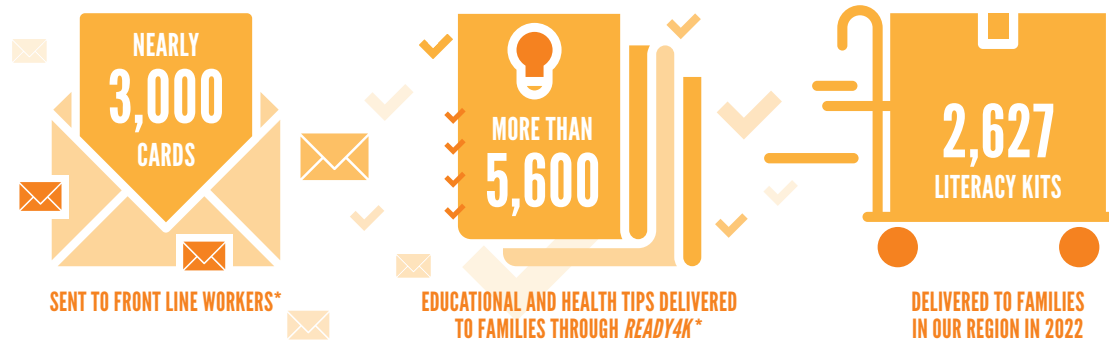
United Way of Greater Richmond & Petersburg

We are a local nonprofit that believes there are common problems in our region worth fighting for and that no individual or organization can solve these problems on their own. We bring together individuals, organizations and nonprofits to collectively solve fundamental problems in our region.

We serve the region’s neighborhoods and rural areas alike, providing direct service and supporting partners in the cities of Richmond, Petersburg and Colonial Heights as well as the counties of Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan – 11 different localities in all.

## WE LEAD PROGRAMS THAT MAKE A DIFFERENCE.

In addition to supporting the work of local nonprofits, we lead programs that meet specific community needs and provide direct support to hundreds of families and individuals.



\*DATA FROM THE YEAR 2021



Jasmine Phanelson, WomenRise scholarship recipient.

### Program Spotlight: WomenRise



**WomenRise** is a United Way program that provides childcare scholarships to single mothers while they complete their education or train for a better job. Single moms are the most financially at-risk family structures in our local communities. With childcare costing about \$1,000 per month, this scholarship program allows single parents to maintain financial stability while furthering their education.

*“We know a reliable, good-paying job is the most effective way for a single mother to achieve financial stability. WomenRise empowers single mothers to attain the education needed to access more career opportunities, and in turn, greater opportunities for their families.”*

– JAMES TAYLOR, PRESIDENT & CEO OF UNITED WAY OF GREATER RICHMOND & PETERSBURG

## WE FUND LOCAL NONPROFITS

Our current funding cycle invests \$8.7 million in 74 programs at 54 local nonprofits. Our partners address needs in the community ranging from food and shelter services to workforce training and financial stability.

**\$8.7 MILLION** in **74 PROGRAMS** at **54 LOCAL NONPROFITS**



Senior Connections volunteers assisting with meal packaging at Feed More.

### Partner Spotlight: Feed More

**Feed More** is one of our partner organizations working to increase food access and affordability in our region and beyond. Serving 29 counties and five cities, Feed More's reach is incredible, and we are thrilled to be supporting their work. Because Feed More works with various other local partners, their impact is widespread, distributing food through over 270 community partners at various community locations.

## WE BRING TOGETHER VOLUNTEERS

Whether it is distributing United Way Literacy Kits to students or spending time with older adults to combat social isolation, we bring volunteers together to improve the lives of people in our region.



United Way staff assisting a taxpayer at one of our in-person sites.

### Volunteer Spotlight: VITA **vita** Volunteer Income Tax Assistance

United Way's **Volunteer Income Tax Assistance** program helps eligible taxpayers take advantage of the Earned Income Tax Credit (EITC), a tax-saving benefit for working families with low to moderate income. A team of IRS-certified volunteers works with filers to prepare accurate tax returns and deliver the highest possible refund. This program helps people avoid unclaimed tax credits and save money on fees for tax preparation services and refund anticipation loans.

**2,067**  
ACCEPTED TAX RETURNS

**\$2.8 MILLION**  
IN TAX REFUNDS

**\$516,750**  
SAVED IN TAX  
PREPARATION FEES

# CAMPAIGN PLAN AND TIMELINE

## step 1

- Plan your campaign with the help of your United Way representative. Determine start and end dates, map out any events and set your fundraising goals.
- Recruit additional campaign committee members.
- Look over notes from past campaigns or meet with previous ECM's to review challenges and successes.
- Brief senior executive leadership and choose Alexis De Tocqueville and Leadership Circle Ambassadors.

## step 2

- Finalize your organization's campaign committee.
- Begin regular United Way team meetings.

## step 3

- Finalize your United Way giving platform.
- Develop a campaign theme and calendar of events with United Way representative.
- Develop Giving Community strategies with Leadership Circle and Alexis de Tocqueville Ambassadors and begin planning dedicated events for these groups.

## step 4

- Develop a communications plan, making sure to check out United Way's campaign templates and resources.
- Coordinate with your United Way representative to have a story or presentation shared during your campaign.

## step 5

- Talk to your United Way representative about our latest work. Practice your presentation to colleagues so you are ready to tell United Way's story and answer any questions that may come up.
- Leadership Circle and Alexis de Tocqueville Ambassadors should follow up with any potential donors.

## step 6

- Host events for your top-level donors.
- Leadership and Tocqueville Ambassadors should follow up with any potential donors.



- Host kick-off event for all employees.
- Remind your team of your campaign goal and set check-ins to discuss updates throughout the campaign.
- Send initial pledge email and make sure you have a timeline to send reminders throughout the campaign.
- 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!
- Continue educating employees, with help from the United Way team.

# CAMPAIGN KICK-OFF

A campaign kick-off is a company-wide event or meeting to educate and inspire your colleagues about giving back to their community through United Way, with an element of fun. Every campaign kick-off is different. Some larger companies, like **UPS**, host a campaign kick-off that doubles as a chili cook-off. Some smaller companies, like **Virginia Bankers Association**, host an all-staff meeting where they invite speakers to present about United Way's mission. Your kick-off should be tailored to your organization and what best suits your needs.

**Here are some things to consider when planning a campaign kick-off:**

## What is your budget?

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 a budget first.

## Are your colleagues interested?

A key factor in planning an event is to plan something fun and interesting for your coworkers. Garnering as much support and participation as possible 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 people will look forward to!

## What can you do?

If you are at a large organization, think about how you can engage smaller sets of employees to keep them interested. If you are at a small workplace, maybe there is another organization you can team up with for a kick-off event. If you are running your campaign at your busiest time of year, a kick-off event outside of your busy workday or during a break might be the most practical. There are plenty of ways to have great kick-offs, large and small, but be aware of what is realistic.



# 2

## INSPIRE

A key part of your campaign is inspiring your colleagues to support United Way's work in our community. Below you will find ideas for how and when to share information about United Way with your team.

### SHARE THE ENTHUSIASM

#### ✓ Volunteer Opportunities

Engaging employees in volunteer opportunities will allow them the opportunity to directly connect with United Way's work. 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 materials available for you to promote your campaign, including:

- Posters and Flyers ↗
- Template email messages ↗
- Informational materials about our work in specific areas ↗
- Pop-up banners for decoration at events
- And more!

#### ✓ Custom Promotional Materials

Many organizations 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 last year's donors. It is important to acknowledge employees that have given in previous years. Be sure to appreciate them leading up to the campaign kick-off.
- Share prior year results. By sharing last year's results and your campaign goal for this year, you are giving your colleagues something to work toward. If you would like help setting a goal, please speak with your United Way representative.
- Share a schedule of activities for the upcoming campaign. This schedule will generate excitement among employees and give your team an idea of what to expect.
- Send a campaign preview email. ▶
- Display United Way materials throughout the office. ▶

## DURING campaign

- Send a campaign kick-off email from your organization's leadership.
- Share instructions for making a pledge.
- Send donation reminders. ▶
- Invite speakers from United Way to campaign events. This will help employees have a better understanding of the work United Way does in the community.
- Inform employees about incentives or corporate matching gifts. If your senior leadership has matching programs or corporate gifts, it can encourage employees to give more.
- Offer volunteer opportunities to your employees. Volunteer opportunities will help employees feel connected to United Way's mission. ▶

## AFTER campaign

- Highlight campaign results. Share your total raised and be sure to thank everyone who participated.
- Thank donors for their contribution. Hosting a "thank you" event or giving out tokens of appreciation are two great ways to make people feel like their contribution was important.
- Send a "thank you" email to your campaign team. ▶
- Send a thank you email to donors. ▶

### IMPORTANT NOTE

▶ These resources are available at [YourUnitedWay.org](https://YourUnitedWay.org). If there is something that is not included here that you think would be useful for your campaign, let your United Way representative know and we will work with you to find a solution that meets your needs.



# 3

# ASK

People do not give if they are not asked. It is important to directly ask your colleagues to donate to United Way throughout your campaign. Your ask may come in multiple forms – in person, during events or through email. Below is information about Giving Communities and tips you can use to make “the ask.”

## MAKING THE ASK

### ✔ **Talk to your United Way representative.**

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

### ✔ **Get their undivided attention.**

Schedule a time to your colleagues at a meeting or kick-off event and ask them to participate in your campaign with a donation.

### ✔ **Tell the United Way story.**

Come prepared with reasons why people should give to United Way. Use tips on page 10 to help prepare. If you would like to invite a United Way representative to tell the United Way story, please let us know and we can send a speaker.

### ✔ **Explain how to give.**

As the ECM, you can determine which giving platform will be used and it is your responsibility to tell people where and how they can donate. There are a couple of 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 contacts at your parent organization to find out.

### ✔ **Address questions.**

It's essential that everyone has all the information needed before making a donation. Keep an open line of communication between you and your fellow employees so that they can ask questions and express concerns. If you don't have the answers to their questions, you should feel free to reach out to your United Way representative for help! They can assist with answering any questions and will be able to direct you to helpful resources for sharing with your team.

### ✔ **Be direct!**

It is easy to do all the things listed above and still forget to make a direct ask. Make sure you are clear and direct when asking your colleagues to give.

United Way representatives are available to help during the planning or execution of your campaign. We know it can be especially difficult to ask for donations and we are here to make that process as easy as possible. If you would like suggestions, tips or for a speaker to make “the ask,” please let us know.

# 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** /week

provides early learning resources to three kindergarten students in schools in areas of need across the region.

**\$3** /week

provides financial literacy classes, employment assistance and budgeting skill development for 474 people

**\$10** /week

provides free tax prep to three families, maximizing refunds and keeping thousands of dollars in our community

**\$25** /week

provides high quality out-of-school time programs for 500 youth

**\$50** /week

provides one month of adult day care services for two older adults in a safe, nurturing environment

## GIVING PLATFORMS ARE:

### PRINT

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 form to United Way.

### DIGITAL

We also offer a fillable PDF version of our pledge form, giving you a paperless option for collecting and organizing donations. You can find our digital pledge form, along with other resources, at: [www.yourunitedway.org/campaign-resources](http://www.yourunitedway.org/campaign-resources).



### E-PLEDGE: OUR FREE GIVING PLATFORM

Andar's e-Pledge\* is a user-friendly web-based giving platform used to set up payroll deductions or give a one-time gift. In just one click, donors can access all of their options for giving. United Way of Greater Richmond & Petersburg offers e-Pledge for FREE, helping more businesses streamline employee giving and meet their corporate philanthropic goals with no extra cost or licensing.

#### Benefits to Your Organization:

- License-free philanthropic platform
- Free to use and set up annually
- Automatic progress reports sent right to your inbox
- Free customer service – work directly with real people at our local United Way office
- Flexible, customizable platform and messaging
- Keeps your company green by reducing paper waste
- Reduce subscription costs by using Andar's e-Pledge through United Way of Greater Richmond & Petersburg

\*Andar's e-Pledge is provided by your local United Way of Greater Richmond & Petersburg through our CRM Andar 360 database.

# 4

# THANK

Thanking those who participated in your campaign is a critical part of your campaign. Not only will your colleagues feel appreciated for their contributions, but they will be more likely to support the campaign in the years ahead because they know their contributions truly made a difference.

## ✓ Thank top-level management support.

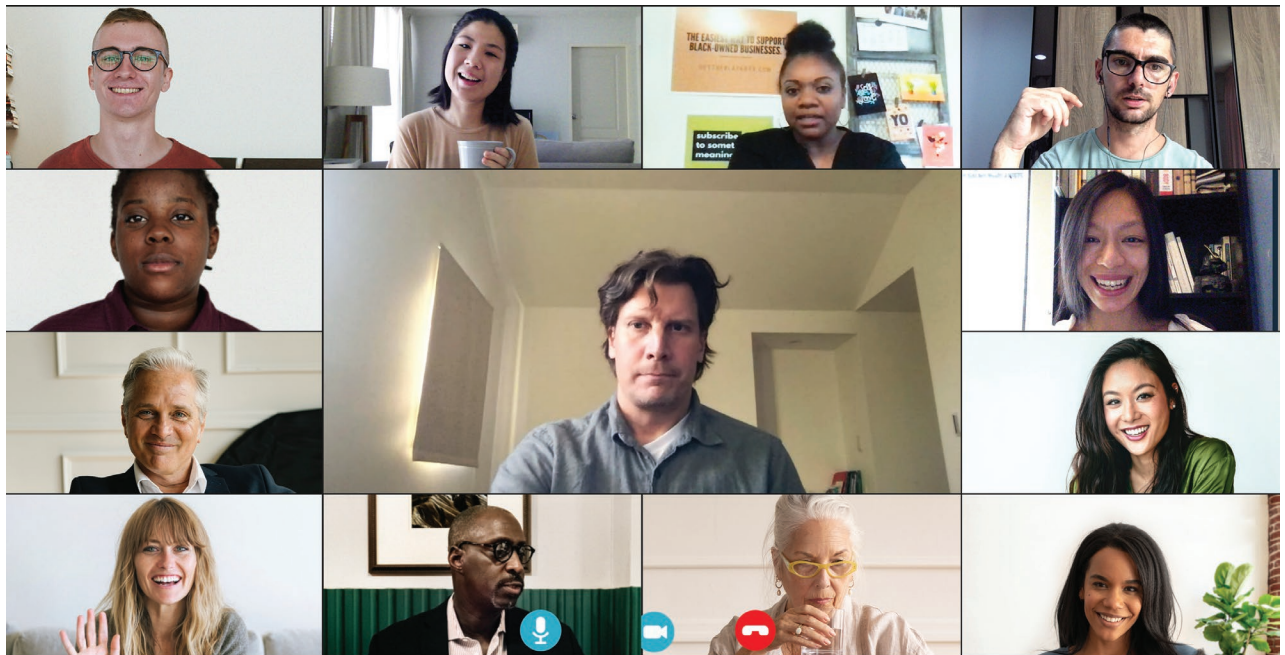
The most successful campaigns have strong buy-in from senior leadership. Thank your executive leaders for their support of the campaign. Be sure to highlight any effort on their part to secure corporate gifts or company matching programs.

## ✓ Thank your campaign team.

Your team will have helped your organization's campaign from start to finish. They were able to lighten your workload and increase the impact of your campaign. Be sure to thank them for their dedication and hard work.

## ✓ Thank 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

United Way sends regular communication to donors. We would love to stay connected to our donors at your organization! Share donor details so that we can thank your colleagues in thank you mailings and give them updated information about what we do throughout the year.

# WRAP-UP

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

## REPORT results

- Collect all gift information.
- Look over paper pledge forms to ensure everything looks correct.
- Schedule a time for your United Way representative to pick up results and any materials you used during the campaign.

## PLAN ahead

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

- Use our Planning Resource [▶](#) to gather feedback about the campaign from senior leadership, your campaign team and your United Way representative. Talk about what worked and what didn't and start a conversation about what next year's campaign will look like.
- 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 your United Way representative.

## STAY involved

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 your human resources department to implement a new-hire program to give new employees the opportunity to contribute when they are onboarded. 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 already receiving our emails and would like to, talk to your United Way representative or visit [YourUnitedWay.org](http://YourUnitedWay.org).

[▶](#) Available at [yourunitedway.org](http://yourunitedway.org).

### QUESTIONS:

- Contact your United Way representative, or
- [uwcampaign@yourunitedway.org](mailto:uwcampaign@yourunitedway.org)
- (804) 771-5820

Scan the QR code to learn more about workplace campaigns:



United Way of Greater  
Richmond & Petersburg



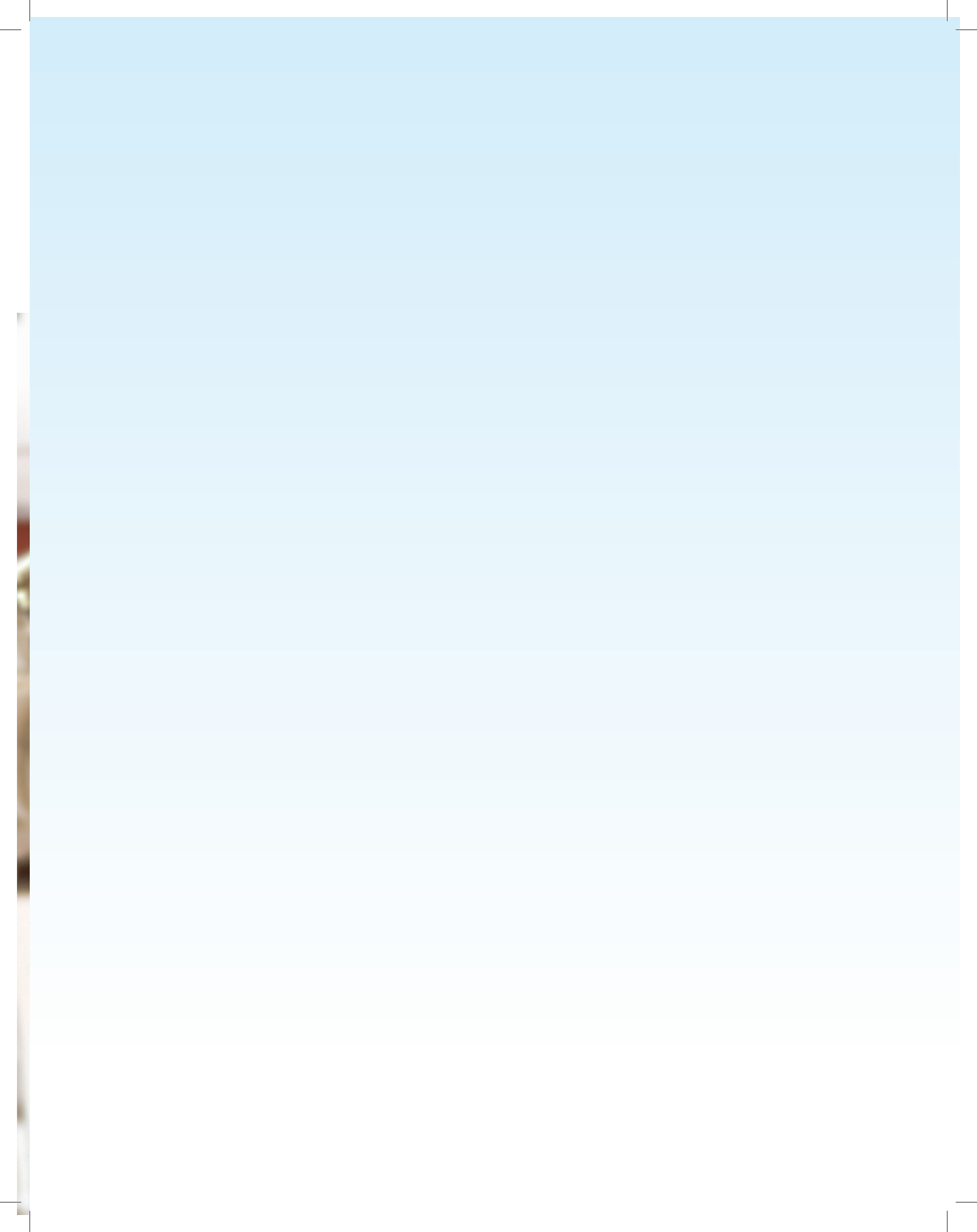
[YourUnitedWay.org](http://YourUnitedWay.org)

# THANK YOU FOR RUNNING A CAMPAIGN TO SUPPORT



United Way of Greater  
Richmond & Petersburg







**THANK YOU FOR SUPPORTING  
YOUR UNITED WAY**



United Way of Greater Richmond & Petersburg  
(804) 771-5820 || [YourUnitedWay.org](http://YourUnitedWay.org)