



United Way of Greater  
Richmond & Petersburg

# WORKPLACE CAMPAIGN GUIDE



# 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!



United Way of Greater  
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# STEPS TO SUCCESS

WE BELIEVE THAT EVERY INDIVIDUAL IN OUR REGION DESERVES TO BE SUPPORTED ALONG THEIR 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 to confirm their support of the campaign. Map out and communicate where you'll need their specific involvement, such as sending an email to staff to encourage giving. Inform your leadership of campaign dates and goals, and 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 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.**

Every successful campaign has a goal. Look at your past fundraising efforts and set an ambitious but attainable goal. Ask senior leaders if you can offer an incentive to employees for reaching the goal, such as a paid day off or a 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:

[YourUnitedWay.org/giving-communities](https://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 some suggested roles and responsibilities for members of your campaign team.

## Communications Coordinator

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

## Fundraising Champions

*For larger organizations, we recommend segmenting departments, floors or locations into teams.*

- Works with ECM to execute communication plan to their team
- Encourages attendance from their team for campaign events
- Thanks all donors on their team

## 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



Workplace campaigns are a fun and convenient way for employees to have a significant impact on their community.



Many companies bring fun to their campaign kick-off with music, food and games!

# PLANNING YOUR 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. While each campaign kick-off looks different, all kick-offs should include a United Way speaker and campaign announcements (important dates, goal and incentives). Depending on the size and budget of your organization, a kick-off may include food, beverages and fun activities. Your kick-off should be tailored to the culture and needs of your organization. Consult with your United Way representative for examples and ideas when planning your kick-off.

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

- Ideal timeframe
- Budget
- Expectations of leadership team
- Office culture
- "Fun" element
- Virtual/hybrid accommodations



# 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.
- Look over notes from past campaigns or meet with previous ECM's to review challenges and successes.
- Recruit additional campaign committee members.
- Meet with senior leadership team to confirm dates, campaign goal and any major campaign events.

## step 2

- Finalize your organization's campaign committee.
- Choose a giving platform with United Way.
- Begin regular United Way team planning meetings.

## step 3

- Finalize your United Way giving platform.
- (Optional)* Develop Giving Community strategies with Leadership Circle Ambassadors and begin planning dedicated events for this group.
- Develop a campaign theme and calendar of events with United Way representative.

## step 4

- Develop a communications plan. Utilize United Way's campaign templates and resources at [YourUnitedWay.org/workplace-campaigns](https://www.YourUnitedWay.org/workplace-campaigns)
- Coordinate with your United Way representative to have a story or presentation shared during your campaign.

## step 5 *(optional)*

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



- Send a campaign kickoff email to all employees.
- Send the initial pledge email and make sure you have a timeline to send reminders throughout the campaign.
- Continue educating employees, with help from the United Way team.
- Remind your team of your campaign goal and set check-ins to discuss updates throughout the campaign.
- Throughout your campaign, encourage your colleagues to give their donation to United Way for the most impact.



### IMPORTANT NOTE

Be confident when asking your colleagues to participate in the giving campaign. The #1 reason people do not give is because they are not asked.

# 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 virtual and print 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!
- 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.
- 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.*
- Send a campaign preview email. ▶
- 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.
- Display United Way materials throughout the office. ▶

## DURING campaign

- Send a campaign kick-off email from your organization's leadership. ▶
- Inform employees about incentives or corporate matching gifts. If your organization has matching programs or corporate gifts, it can encourage employees to give more.
- Share instructions for making a gift.
- Offer volunteer opportunities to your employees. Volunteer opportunities will help employees feel connected to United Way's mission. ▶
- Send donation reminders. ▶

## AFTER campaign

- Highlight campaign results. Share your total raised and be sure to thank everyone who participated.
- Send a "thank you" email to your campaign team. ▶
- 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 donors. ▶
- Communicate with United Way about campaign results.

### IMPORTANT NOTE

▶ These resources are available at [YourUnitedWay.org/workplace-campaigns](https://YourUnitedWay.org/workplace-campaigns). 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.



You can also scan here to learn more about workplace campaigns.

# 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 are some helpful 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 gather 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. Invite your United Way representative to help you tell the story at your meeting or event.

### ✔ **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, your company may have already determined the giving platform to use. Ask your senior leadership to find out.

### ✔ **Address questions.**

It's essential that everyone has all the information needed before making a donation. Provide your contact information on all campaign communications so that your colleagues can ask any questions they may have. 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 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.



## 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:

[YourUnitedWay.org/workplace-campaigns](https://YourUnitedWay.org/workplace-campaigns)



### 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 third-party vendor 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 donated and participated 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 contact information so that we can reach your colleagues with 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 and has a signature.
- 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 Campaign Debrief and Planning Ahead document [▶](#) 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 how to get started.
- 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/workplace-campaigns](https://YourUnitedWay.org/workplace-campaigns).

[▶](#) Campaign resources available at [YourUnitedWay.org/workplace-campaigns](https://YourUnitedWay.org/workplace-campaigns)

### 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](https://YourUnitedWay.org)



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