

# HOW TO RUN A GREAT UNITED WAY CAMPAIGN



---

# WELCOME!

Thank you for leading the United Way campaign at your company! As an Employee Campaign Volunteer, you are an invaluable partner with United Way of Southwest Wyoming, engaging your organization in the fight for the education, health and basic needs of all Southwest Wyoming citizens.

This handbook is your basic guide for how to PREPARE, PLAN, CONDUCT, and CONCLUDE your company's campaign. We offer you many ideas, strategies and resources to help make your campaign a success. And remember, United Way staff and volunteers are here to help in any way they can!

**UNITED WAY OF SOUTHWEST WYOMING**  
510 S. MAIN ST.  
ROCK SPRINGS, WY 82901  
(307) 362-5003  
[swunitedway.org](http://swunitedway.org)

---

# CONTENTS

Why United Way.....	4
How United Way Invests.....	5
4 Best Practices to Running a Workplace Campaign.....	6
Running a Workplace Campaign .....	7
Sample Campaign Timeline .....	8
Sample Rally Agenda .....	9
Tips to Increase Giving Levels .....	10
Campaign Ideas .....	11

# WHY UNITED WAY?

## HISTORY

Since 1978, Sweetwater County local businesses have been achieving their local philanthropic goals by giving back through United Way workplace campaigns. Over the years we have added Lincoln, Sublette and Uinta Counties = United Way of Southwest Wyoming. United Way of America began in 1887.



## IT WORKS

United Way fights for the education, health and basic needs of every person in southwest Wyoming.



## IT'S EASY

Most people give via payroll deduction, pledging in the fall to have a certain amount taken out of each paycheck the following year. United Way's materials are easy to distribute and collect. After some planning and a brief 1-2 week solicitation period (your workplace campaign), you're done!



## EFFECTIVE

Money raised here stays here. Funds raised in each county stays in that county. Grant award amounts are based on what was raised in that county. When you give through United Way you are not helping just one organization, but many.



# HOW UNITED WAY INVESTS

The funds raised by United Way of Southwest Wyoming are invested in local programs that tackle the most pressing challenges people in our communities face, which is why people like you help determine how those dollars are invested.

Local volunteers, our Community Solutions Teams, review grant applications, conduct site visits and interview the program applicants, identifying which programs align with our goals and strategies and will create the most lasting impact in our community. We currently fund 24 community programs in Sweetwater, Uinta, Lincoln and Sublette Counties.



## EDUCATION

UWSW will build and participate in collaborations that will affect a measurable increase in kindergarten readiness, third-grade reading scores, and high school graduation rates.



## HEALTH

UWSW will build and participate in collaborations that will improve access to and availability of healthcare.



## BASIC NEEDS

UWSW will foster an integrated set of community-wide services to optimize individual's ability to meet their basic human needs in the areas of Food & Shelter; Safety; Transportation; and Financial Stability.



# 4 BEST PRACTICES TO RUNNING A WORKPLACE CAMPAIGN

## #1 Ask Your CEO/Top Executive to Endorse Your United Way Campaign

Meet with you CEO to discuss campaign goals, secure his/her endorsement, request permission to make presentations, offer incentives to donors and confirm a corporate match or specific gift.

## #2 Customized Materials

Work with United Way staff to personalize posters, emails.

## #3 Schedule Presentations - Distribute Forms and Turn In

Workplaces that have a formal presentation to launch their campaign have an increase in giving. United Way staff, volunteers, and agencies are available to give or assist at any presentation, any time any place!

A 10-15 minute presentation during an already scheduled meeting is a great idea. Set your internal campaign dates. Then notify all department supervisors. Ask them for THEIR support in having a UWSW presentation as a part of their staff meetings. Encourage employees to turn in their pledge forms right then and there.

## #4 Attend Campaign Kick-Off or Meet with United Way Staff in Advance

Plan, brainstorm and customize your internal campaign for maximum results.



# RUNNING A WORKPLACE CAMPAIGN

## Prepare

- Learn about United Way and its programs
- Meet with your CEO
- Recruit your United Way team
- Analyze previous year's campaign results
- Set new goals, timeline and strategies

## Plan

- Determine theme and timeline
- Review campaign materials
- Plan and schedule meetings, events, fundraisers
- Ask United Way or other speakers to attend
- Consider running a raffle to engage your co-workers while raising additional funds

## Conduct

- Educate employees by promoting your campaign through a kick-off event, presentation rallies and other special events.
- Send a customized kick-off email to employees. United Way can provide a template.
- Include incentives for attendance, participation, donations and reaching goals.
- Use a multimedia approach, including periodic emails, videos, social media, voicemails, paystub inserts, posters and displays.
- Hold presentations, feed them if possible. People love free food!
- Provide information on how the pledge process works.
- Utilize United Way produced videos, emails and stories.
- Specifically ask co-workers to participate by donating, volunteering or advocating.
- Participate in Helping Hands Day as a team building activity and as a way to learn more about a United Way Community Partner.
- Follow-up with employees and past donors; reminders are often appreciated.
- Account for all off-site employees, new hires and retirees. Followup with employees that are on leave.
- Update employees on progress.

## Conclude

- Consider final push and close-out strategies to encourage last minute commitments.
- Always recognize donors. Write a thank you note, email, or a thank you event for everyone.
- Critique and document the campaign to ensure that next year's campaign goes smoothly.
- Develop a year-round United Way program with newsletter articles chronicling community impact, volunteer opportunities and agency tours, orientation sessions for new employees.
- Invite your United Way representative to speak to employees at any time during the year to share success stories and say thank you.

# SAMPLE CAMPAIGN TIMELINE

Organizations have different cultures, numbers of employees, locations and other details that affect the length and focus of their United Way campaign. Assess what will work best for your workplace and begin planning based on those parameters.

Ideally, campaigns lasting two weeks have a good balance of impact and length. One exciting kick-off rally or 3 - 4 smaller rallies should provide your co-workers with the key information they need to make a donation decision within the campaign timeframe.

Shorter campaigns of a few days to one week can work when you are organized and have a track record of campaign success. These organizations likely have a highly engaged CEO and strong connection to the community. You may hold one all-encompassing rally or 1-2 small rallies.

Larger organizations that need more time to engage a larger workforce can expect to hold between 5-10 rallies and/or 2-3 special events. Spreading the fun over two weeks, or slightly longer, often works best in your organizational culture.

Here is a brief timeline highlighting steps in your planning and execution phases:

## 5-6 WEEKS OUT

- Review last year's performance and campaign materials
- Seek guidance for this year's campaign goals
- Attend Campaign Breakfast or meet with UWSW staff
- Start recruiting your internal campaign team and hold the first meeting
- Educate your team members on United Way's role in the community

## 3-4 WEEKS OUT

- Develop a campaign plan
- Decide on a theme and incentives
- Set a rally schedule
- Assign tasks to team members

## 1-2 WEEKS OUT

- Create energy, awareness and passion
- Begin publicizing your campaign
- Send a CEO letter endorsing the campaign
- Talk about United Way, the benefits of giving and your kick-off event
- Review all plans for event kick-off and pledging period with your team

## IT'S CAMPAIGN WEEK(S)

- Create energy, awareness and passion
- Begin publicizing your campaign
- Send a CEO letter endorsing the campaign
- Talk about United Way, the benefits of giving and your kick-off event
- Review all plans for event kick-off and pledging period with your team

## CAMPAIGN WRAP-UP

- Collect all remaining pledges
- Arrange for the CEO to communicate the campaigns success and thank employees, or send a customized thank you
- Contact United Way to schedule a pick-up of pledge envelopes and excess materials
- Thank your campaign team



# SAMPLE RALLY AGENDA

This sample agenda covers a 15-20 minute rally, but it can be adjusted in any way that best fits your timeframe and campaign goals.

■ Why I support United Way: 2 minutes  
*Organization Spokesperson*

- Share a story of why you choose to LIVE UNITED
- Might run a United Way video

■ United Way's Role Within the Community: 5-7 minutes  
*United Way Representative*

- Talks about what UWSW does

■ Impact of Contributions: 3-5 minutes

*United Way Representative / Agency Rep / Employees*

- Agency Speaker
- United Way video
- Employee testimonials

■ Leadership Ask, Next Steps and Thank You: 3-5 minutes  
*Organization Spokesperson*

- Pledge process
- Recap of last year's campaign
- Goals for this year's campaign  
Employee campaign  
Corp. match or contribution
- Participation rewards, raffle
- Thank you!



# TIPS TO INCREASE GIVING LEVELS

## INCREASE DONOR PARTICIPATION

- **Get help and don't do this by yourself!** Recruit a United Way committee with representation from each department in your company to join you.
- **FREE FOOD!** Have a lunch, pizza, snacks or donuts at the United Way meeting to help draw more attendance.
- **Set a goal of 100% ASK.** This is different than 100% participation. Collect a completed, signed pledge form from EVERY employee, even if the pledge is \$0 so that you can make sure every person heard the message and had an opportunity to give.
- **Promote it!** Send daily reminders to turn in pledge forms, especially on the last day of your campaign. Post United Way news on message boards and internal e-mail. Take pictures and share them.
- **On the last day, review your list of past donors and cross reference it with those who've already given.** Follow-up one-on-one with those past donors and remind them it's the last day to give.
- **Extend the giving opportunity to new hires throughout the year.** Give out pledge forms at orientation, inviting them to start giving right away.

## INCREASE YOUR AVERAGE GIFT

- **Stress giving via payroll deduction.** People tend to give more when spreading their gift out week-to-week rather than making a one-time gift via cash or check.
- **Include attractive incentives to help motivate giving.** They don't have to cost you a lot (or anything). Then use those incentives for tiered levels of giving. For example, \$5/pay, gets you one benefit or maybe you are entered into a raffle with five ticket. If you give \$10/week, you get two benefits or get 10 raffle tickets.
- **Leverage "fun-raisers".** Ask for a completed pledge form, rather than a small cash donation. For example, instead of "selling" Jeans Day passes for \$5, ask that they pledge a certain amount via payroll deduction. Conduct your United Way campaign apart from other internal fundraisers.
- **Ask an associate who's benefited from a UW program to share their story.** Nothing like a personal testimonial to get the tears, and the dollars, flowing.
- **Promote membership in United Way's Landmark Society.** Membership begins with a \$500 annual gift. It include recognition at the Celebration Event and a plaque with a new medallion each year of giving at the Landmark level.

HOW WILL YOU USE THE 3 I'S  
TO INCREASE GIVING

INFORM  
INSPIRE  
INCENTIVIZE



# CAMPAIGN IDEAS

## THEMES

Themes help create excitement and energy for the campaign and are used to drive results. Finding a good way to connect campaign fun with the United Way mission ensures a well-rounded campaign.

- Live United
- Company Milestone or Anniversary
- Superheros
- Carnival theme
- Driving Results - car/race
- Beach / Hawaiian Luau
- Hollywood
- Sports / Olympics
- University of Wyoming - Cowboys
- 60's, 70's, 80's
- Holiday (Thanksgiving)
- Denim and Diamonds
- In the Barnyard
- Trivia Night
- Cook-Off (Grilled Cheese, Chili)
- Back to School
- Back to Prom
- Mexican Fiesta
- Game Night
- Tailgating
- Masquerade Ball

## SPECIAL EVENTS

Special events can be used to raise awareness of the campaign and are held as kick-off or wrap events.

- Jeans Day - "sell" jeans day coupons
- Bake Sale/Basket Sales/Craft Sales
- Breakfast or Lunch Potluck - donation to eat
- Chili Cook-Off - buy tickets to vote
- Basket Auction - departments donate a basket
- Ice Cream Social
- Cake Walk
- Team or Dept. Challenges
- Diaper Drive
- Golf Tournament
- Managers Serve Breakfast or Lunch
- Car Wash
- Raffles / Silent Auction
- Dunk Tank

## INCENTIVES

A large budget is not necessary for incentives. There are many free incentives you can offer to employees for participating in the campaign.

- Gift Cards
- Personal Day Off
- Sleep-In Pass
- Long-Lunch Pass
- Early-Out Pass
- Jeans Day
- Parking Spot
- Company Gear
- Lunch with CEO or Management
- Embarass CEO (hair dye, dunk tank)
- Honor Wall
- Raffle Tickets
- Department Lunch
- Dunk Tank
- Managers Serve Breakfast or Lunch

**MISSION:**

## NO PLACE LIKE HOME

We know many senior citizens prefer to live in their own homes.  
Community programs help them do that.



**MISSION:**

## FULL TUMMY

We know when kids aren't going hungry  
they are far more likely to succeed in school.  
And therefore, in life.

