



# WORKPLACE CAMPAIGN

# ACTION GUIDE



Welcome to the beginning of a wonderful and personally rewarding experience!

As a United Way & Volunteer Services of Greater Yankton Workplace Campaign Coordinator, you are an integral part of a special group of volunteers dedicated to making a measurable difference in the lives of people in our community. Because of the Workplace Campaign, United Way & Volunteer Services of Greater Yankton can support more than 65+ local programs, focusing on the education, financial stability, and health of our community.

**United Way's Workplace Campaign is about more than money. It inspires, informs, and demonstrates that lives are positively impacted when people work together to mobilize resources that build a strong, caring community.**

This Workplace Campaign Action Guide will help keep you informed and organized. Before starting your organization's Campaign, please read the information. It is a step-by-step fundraising tool that provides key resources, messages, best practices, and tips to implement a successful Workplace Campaign. **Remember, United Way is here to provide you with direction and support!**

Thank you for being a part of the United Way & Volunteer Services of Greater Yankton team of Workplace Campaign Volunteers. We are proud to have you on board!

# MAKE A BIGGER IMPACT!

## CAMPAIGN COORDINATOR

### ROLES AND RESPONSIBILITIES

As the Workplace Campaign Coordinator, **you are a team leader and champion for United Way!** Create a team to help you motivate and coordinate the members of your workplace to support United Way & of Greater Yankton. There is no doubt you will plan, organize, and coordinate a fun, informative, and successful United Way Workplace Campaign! Remember, we are here to help you along the way as well!

#### Your team will ensure the workplace achieves a goal through:

- **Education** – share our community’s needs with every employee and highlight the many ways United Way of Greater Yankton helps make our community better.
- **Solicitation** – give every employee the opportunity to make a Campaign contribution.
- **Appreciation** – thank every employee who participates in the Workplace Campaign.

#### Throughout the Campaign, your team takes on these responsibilities:

- Attends a United Way & Volunteer Services Campaign one-on-one training.
- Partners with other United Way Campaign Coordinators to educate and involve all employees in the Workplace Campaign.
- Provides every employee the opportunity to give.
- Encourage and arrange CEO support.
- Make GIVING FUN!
- Encourage Leadership Giving.
- Thank everyone for their contributions.
- Report to United Way fundraising results.

#### The Campaign Coordinator and their team oversees all Campaign strategies, which include:

- Company kickoff and recognition events.
- Creative and innovative ways to engage employees. Make it fun!
- Distribution and collection of Community Campaign materials.
- Guest speakers and agency tours from United Way representatives.
- Campaign promotion throughout the organization.
- Submit pledge forms to United Way offices at the United Way Community Impact Center.
- Recommendations for future Campaigns.
- Donor & Volunteer thanks.

# CAMPAIGN SUPPORT

## ONLINE WORKPLACE CAMPAIGN TOOLKIT

You will find an abundance of support through the Workplace Campaign Toolkit, located online at [www.yanktonunitedway.org](http://www.yanktonunitedway.org) Click "MENU" then "Workplace Campaign." The online information will supplement the information in this handbook.

### Promotional Tools

[New Hire Letter](#)

[Daily Email Messages](#)

[CEO Support Letter](#)

### [Campaign Idea Book!](#)

### United Way Marketing Tools

[Campaign Video](#)

[Campaign Brochure](#)

[Campaign Posters](#)

[United Way Logo](#)



**THANK YOU**

**FOR INVESTING IN HOPE AND LIVING UNITED.**



# BEST PRACTICES!

## #1 – BUILD AWARENESS

A successful Workplace Campaign helps build awareness of United Way of Greater Yankton's impact on the community. This section outlines key message points for you to use when communicating to your company employees. Feel free to utilize all or parts of these **"key messages"** in your presentations, emails, newsletters, posters, etc. This information will help you convey how United Way – supported through the Workplace Campaign – impacts our community. Ongoing communication helps donors better understand their return on investment.

### What is UNITED WAY?

**For 65+ years, United Way of Greater Yankton has taken a leadership role in mobilizing people and resources to achieve positive and lasting change in the community.**

- UW is more than just a fundraiser and facilitates over 14 community programs internally
- UW works with & supports organizations who change lives & strengthen community
- UW partners to understand, act and find new solutions to old problems
- UW works to produce measurable results
- UW fights for the education, financial stability, and health of every person in the greater Yankton community.

**99% OF EVERY DOLLAR RAISED IS INVESTED LOCALLY.**

### Tell them...and then TELL THEM AGAIN!

It is said that for someone to really "get" a message, **they need to hear that message at least 3 times.** This holds true with your Workplace Campaign. You can communicate the work of United Way in a variety of ways:

- Posters on company bulletin boards
- Show the Campaign Video on display screens throughout the office
- UW Funded Partners can attend kick off and speak towards impact of donations
- Employees can take Agency Tours!
- Stories in the company newsletter
- Brochure or literature inserted in employees' payroll envelopes
- Email messages about United Way
- Host a Leadership breakfast

### YOUR GIFT HAS POWER!

When combined with other contributions, your donation supports over **60 local human service programs focusing on the education, financial stability, and health of our community.** We can make a difference together that none of us could achieve alone.

## #2 – RECRUIT & TRAIN YOUR CAMPAIGN COMMITTEE

Don't run your campaign alone. Recruit a committee of enthusiastic, resourceful, and committed employees to help you plan the best possible campaign!

**Diversity is important.** Involve representatives from various departments in your organization, such as marketing, communications, human resources, etc.

**Set up regular meetings** and delegate responsibilities. You can ensure campaign success by creating roles for each committee member.

## #3 – SECURE EXECUTIVE OR TOP LEVEL SUPPORT

The success of your campaign depends on top-down support, particularly the commitment and involvement of your CEO and executives. Securing the visible support of your leaders adds momentum to the planning process. This will have a big impact on your ability to achieve campaign goals!

### Get your Campaign Started

The most successful Workplace Campaigns have the early and full support of the organization's CEO. **Prior to beginning your Campaign, meet with your CEO and other top executives within the organization to gain their overall support,** review last year's results, set new goals, obtain their Leadership gifts (\$250 or more), and discuss the varied options to Campaign development and implementation.

## #4 – DEVELOP A CAMPAIGN PLAN

### The First Rule of Fundraising...ASK!

You raise money when you ask for it. Just the same, you won't raise money when you don't ask. Too simple? Not really. The more you ask, the more money you will raise. **Try and avoid thinking about asking someone for money. Rather, focus on the action of asking.** You are providing the opportunity for people to make an impact on their community!

### How to Set a Goal

Every year, each organization should strive to climb higher on the ladder to success. Or maybe your goal is to gain more givers or leadership givers. It's your call!

### Identify Growth

Does your company offer a corporate match for employee donations? If so, what are the guidelines? Does your company sponsor events, have grants or foundation dollars? You may want to consider these types of questions when working to increase corporate support.

## Share the Goal

A workplace goal provides an incentive to give and measure success. Share your goal during your Campaign Presentation and or via employee emails. **The more you remind potential donors of the benefits of their donation, the more likely they are to contribute to the shared outcome!**

## #5 - MAKE GIVING FUN!

Your Campaign can be FUN!



Promote your campaign with banners, posters and a kickoff event. A Campaign kickoff event brings everyone together for a common cause. Have fun with it!

**Make sure your CEO and senior management can attend the kickoff.**

Kick off the Campaign at an all staff meeting that is already on the calendar. This prevents employees from having to attend an additional meeting or rearrange their schedules. If you can, include a special breakfast or lunch with activities, drawing, prizes, games and contests!

Check out [Campaign Ideas](#) within the Online Campaign Toolkit for creative ways to make giving fun at your workplace.

**REMEMBER...that incentives are a great way to get people involved in your campaign!** They can be incentives to attend meetings, return contribution cards or to give. Incentives can be raffles, giveaways, early bird contribution card returns, or friendly department competitions!

Also, remember that token incentives are more effective than expensive incentives. Some people may react negatively to the idea of a lavish reward for giving to United Way. It can seem inconsistent with the spirit of United Way, so please use your best judgment. A good place to start is with your vendors. Your vendors may be able to provide gifts or loan merchandise.

Employees favorite incentives ideas...paid vacation days or VIP Parking Space!

**United Way will also have some incentives on hand to share with you!** Including United Way t-shirts, swag and items like gift cards and coupons donated from local businesses. Ask us about incentives!

## #6 – RUN A LEADERSHIP CAMPAIGN

Leadership Giving Campaigns are an effective strategy to provide a boost to the Campaign. Focus on Leadership Giving at the start of your Campaign to build momentum and set the pace for success.

## Strategies for Success

- **Identify existing Leadership givers. They will be the best ambassadors!**
- Pinpoint top Leadership giver prospects.
- Encourage peer participation.
- Match up peers with peers to make “the ask.” The individual who makes “the ask” should have a good rapport with the person he or she solicits.
- Publicize the organization’s Leadership investment goal as part of the overall goal.
- Follow up with prospects until each pledge card is received.
- Send thank you emails or notes to each Leadership giver.
- Ask your CEO to host a reception to acknowledge all Leadership givers.

## Suggested Ways to Ask

“Your leadership is very important in this company. And your Leadership gift is vital to the success of our Campaign because you set the tone.

We need your assistance to set an example for your peers and for your employees to follow. Will you help our community by investing in United Way at the Leadership level?”

# #7 - FINISH YOUR CAMPAIGN WITH A THANK YOU



## How to Say THANK YOU

Thank everyone who donated to United Way! With a handshake or a note, make sure all donors feel appreciated!

**Host a fun thank you event, like an ice cream social, pizza party, breakfast, or cookout.**

Publish a thank you note in your newsletter or on social media.

Have your CEO thank all donors with a letter or announcement!

**Give out special awards or prizes to departments that gave generously or at 100%.**

## How United Way of Greater Yankton Says THANK YOU

- **Each organization receives a THANK YOU poster with all donors listed (anonymous donors will not be listed).**
- Heart Club Donors will receive a personal thank you card.
- Every donor will receive a personalized email if their email was provided.
- Workplace Campaign Awards will be distributed.
- Display your organization’s United Way Campaign Award & Community Partner Decal!

# #8 WRAP IT UP & REPORT SUCCESS

## Stay Organized

- Review your results and make partial reports to United Way.
- Collect and prepare pledge forms as they come in.
- Put all the information, results, and suggestions in a file for next year's Campaign Coordinator.

## Make Sure Pledge Forms Are Filled Out Correctly

- Attach checks/cash to appropriate pledge card.
- Check that all necessary information is completed, and the pledge card is signed.
- Your HR Department will receive one pledge card to process with payroll, the other goes back to United Way for their donation records.

## Ways for Employees to Contribute:

- Payroll Deduction: This is the most popular way people invest in United Way. It is automatic and worry-free. A substantial investment can be made over the course of a year, paying just a little at a time. **Please have them indicate the number of pay periods your organization has during the year.**
- Cash Contribution: Cash is accepted or make checks payable to United Way of Greater Yankton.
- Direct Deposit, Billing or Credit Card: Options are available at [www.yanktonunitedway.org/give](http://www.yanktonunitedway.org/give).  
Text to Give: You may also text the word **YANKTON** to short-code **41-444** on your phone to donate with a credit card.

## Wrap Up & Report Success!

- **Verify the address of the organization and the current number of employees & contributors.**
- Discuss your organization's policy on matching gifts.
- If possible, deposit all cash received at special events and have a check payable to UW.
- Turn in your completed Report Envelope with: *Cash and checks with pledge forms, Copies of all pledge forms, electronic file of all donors*

Thank you again for being a part of the United Way & Volunteer Services of Greater Yankton team of Workplace Campaign Volunteers. We are proud to have you on board!

# THANK YOU!

Please reach out to United Way Staff anytime at [info@yanktonunitedway.org](mailto:info@yanktonunitedway.org) or call (605)665-6766.



# CAMPAIGN CHECKLIST



<input checked="" type="checkbox"/>	TO DO	NOTES
	<b>MEET</b> with your CEO to discuss their vision for the campaign.	
	<b>EXPLORE</b> resources in the UW Campaign Toolkit at <a href="http://www.yanktonunitedway.org">www.yanktonunitedway.org</a>	
	<b>DEVELOP</b> a campaign plan including dates, fundraising goal, outreach, etc. Meet with UW's Resource Development Director for assistance!	
	<b>RECRUIT</b> a committee to help plan and coordinate meetings.	
	<b>PLAN</b> to attend community campaign kickoff and recognition event, September 14 <sup>th</sup> at the Boathouse in Yankton	
	<b>KICKOFF</b> your workplace campaign and run an informative, exciting, time limited campaign drive.	
	<b>MAINTAIN</b> enthusiasm and momentum by sending frequent emails. Start by sharing the United Way campaign video!	
	<b>ORGANIZE</b> and invite co-workers to participate in one of the many campaign activities you have planned!	
	<b>INFORM</b> your CEO on campaign performance midway. Ask them to reach out to employees!	
	<b>ANNOUNCE</b> your results to your organization and to United Way! Turn in pledge forms to HR and to UW!	
	<b>THANK</b> your donors and committee members!	