

WORKPLACE CHAMPION



GUIDE



UNITED WAY
Marathon County

That's you!

Champion / [cham-pee-uh n]

1. a person who fights for or defends any person or cause.

ie:

a *Champion* of United Way in your workplace.

2. a person who takes first place.

ie:

anyone who serves as a United Way *Champion* is a winner for taking on this role.



UNITED WAY
Marathon County

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THANK YOU for taking on this role as the United Way Champion in your workplace. Whether you volunteered, or were volunteered by someone else, know the importance of your role and the impact you can make.

As a United Way Workplace Champion, you'll have an opportunity to showcase your leadership and project management skills at work, network with colleagues at your workplace and in other industries, and create positive impact in our community.

We've prepared this guide to help you maximize your time and effort. Trust us. These tips are proven to work. If you follow them, your workplace campaign will be successful.

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WHERE TO BEGIN?

5 BEST PRACTICES FOR A SUCCESSFUL CAMPAIGN

1. PREPARE

- Every company culture is different. United Way campaigns are flexible and easily customized. We'll help you tailor yours to match your corporate goals, philanthropic focus or time and resources.

2. ENGAGE: Make giving personal and meaningful

- **Be the first to pledge.** Then, thank those that follow your example.
- **Make it relevant.** Share a few ways United Way is impacting the community.
- **Invite Questions.** Be prepared for concerns by being knowledgeable about United Way's work.

3. MOTIVATE: Create specific events that inspire action.

- **Make challenges achievable.** Asking people to give \$2 per week sounds easier than \$100/year
- **Create a competition.** Whether it's between departments or floors, locations or branches, create a contest to see who raises the most money, has the highest participation rate or signs up the most volunteers.

5 BEST PRACTICES, CONTINUED...

4. ASK: “NOT BEING ASKED” IS ONE OF THE TOP REASONS FOR NOT GIVING

- Personal contact and positive attitude are critical to your campaign team’s success.
- Utilize all corporate channels for “the ask”.
- Make it personal. A personalized ask is best, particularly from a friend or colleague. Utilize personal connections and knowledge in emails and communications.
- Start off with people who already give. Their participation will build momentum.

5. THANK: RECOGNIZE EVERYONE’S CONTRIBUTION TO THE CAMPAIGN, NOT JUST THEIR DONATION

- **You can’t thank them enough.** Say “thank you” when you pick up pledge cards (electronic campaigns will automatically generate acknowledgments) and send out thank you emails.
- **Send a CEO communication.** Draft a thank you message for your CEO to send to all employees who participated in your campaign. Whether it’s an email, intranet announcement or keepsake letter, the CEO’s support can be key to success.
- **Celebrate with a thank you event.** It can be part of another company gathering or an event all its own. Either is a great opportunity to publicly honor participants, highlight results and showcase year-round engagement opportunities.



Stay Connected
Year Round

Opportunities to stay connected don’t end when your campaign does. Let your colleagues know about ongoing, year-round opportunities to volunteer in the community and advocate for issues through United Way.

WORKPLACE CAMPAIGN 101

New to United Way campaigns? This page is for you. Since 1953, local businesses have been achieving their local philanthropic goals by giving back through United Way workplace campaigns. Why?

Because United Way works

Marathon County is Uniting to THRIVE. The bold goal is to lift 10,000 community members to financial stability by 2033. This can only be accomplished through a collective effort including other non-profit organizations, schools, local government, civic organizations, and you!

Because giving to United Way is 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. Your Director of Resource Development is dedicated to making your year round engagement efforts easy. Our job is to make you look good.

Because there's something for everyone

Donors can choose to give their gifts to United Way of Marathon County or to United Ways in their home communities all over the United States.

Because United Way is effective. Money raised here stays here

81 cents of every dollar given goes directly to someone who needs it.

When you invest in the community through United Way:

- **YOU CARE** about removing barriers for your neighbors, friends, and family members who are working hard but still struggling to pay their bills.
- **YOU TRUST** the money you contribute to United Way will be allocated to programs that are held to the highest standards. Our partners provide continual reporting that assure the dollars raised are doing the most good for our local community members in need.
- **YOU UNDERSTAND** that almost all the money raised by United Way of Marathon County stays right here in our area, helping to make our community an even better place to live for everyone in Marathon County.
- **YOU KNOW** that any of us could benefit from our partner agency program services at any time. These programs are not just for the "other guy." Our partner programs serve a broad spectrum of the population who just need help getting through a tough time. In fact, one out of every four people living here benefits from the services of United Way of Marathon County.
- **YOU APPRECIATE** that United Way collaborates with the community. United Way works with businesses, faith-based organizations, local government, the non-profit sector, and many other community groups to build the infrastructure we need to proactively tackle our community's biggest challenges.

UWMC “ELEVATOR SPEECH” LANGUAGE

Each option contains active, strong language you can use to tell someone what United Way is. Choose the one that sounds best to you as a base for your own speech. Your United Way experience makes you our best advocate, so be sure to add your own “why I got involved” moment. If you have more time, add a little detail from the bullets below.

Your elevator speech isn’t meant to tell someone EVERYTHING that we do, but if you deliver it with passion, that person might just ask to hear more!

OPTION A:

Giving to United Way is making an investment in the health of our community.

When you give you become a partner in lifting 10,000 community members to financial stability by 2033.

We make your dollars work smarter and bring organizations together to have the greatest impact.

We find partners who are experts in helping and who believe in collaboration and accountability for measurable results.

We make the community stronger together.

OPTION B:

United Way makes your dollar work smarter for everyone in our community.

We help agencies that are already good service providers become members of a collective impact movement.

When we work together towards the same goal of lifting 10,000 community members to financial stability, we can make bigger changes than any one of us on our own.

Our partners as well as our internal programs like The Marathon County Hunger Coalition and Community Closets commit to collaboration. We measure impact and change course when necessary.

OPTION C:

United Way’s work makes our community stronger.

We work to provide access to basic needs for everyone so that every community member can thrive!

We bring organizations and resources together to fight food instability, provide more affordable housing, give clothing to families in need, and much more.

United Way provides a free referral service called 211 that operates 24/7 and can help anyone with questions about mental health, addiction, food, housing, childcare etc.

- **YOU STRETCH** your donation dollars when you give to United Way. Our agency partners have resources that can make a dollar go a lot farther than an individual can.
- **YOU CAN** deduct your qualifying donations on your personal and business taxes.
- **YOU FEEL** like you have done something good. Investing in our community gives you satisfaction and confidence knowing that you personally are helping to sustain and improve the lives of your friends, neighbors, co-workers, and maybe even your own family members.
- **YOU ARE** a part of real solutions. United Way is interested in more than “Band-Aid solutions”- we know that long-term community impact comes from forward-looking and thoughtful planning.
- **YOU MATTER** to United Way and to our community and that is the bottom line. Whether you give time or money you are what matters to this community the most.

CAMPAIGN TIMELINE

8 WEEKS BEFORE KICKOFF

NOTES

- Meet with your United Way Director of Resource Development (Director of RD) to review past campaign results and explore upcoming campaign themes & materials.
- Develop campaign goals and identify opportunities and challenges.
- Draft strategies to meet these goals and improve on last year's results.
- Determine company pledge entry method:
 - ☐ Digital giving through e-Pledge
 - ☐ Paper Pledge Forms
 - ☐ Both
- Determine campaign start and end dates. The most effective campaigns are best kept to 1-2 weeks. Starting & ending a campaign with a clear kickoff & wrap up are important factors when creating your time frame.
- Meet with your CEO or Senior Manager to gain their support for the campaign. Discuss corporate match &/or gift.
- Review and approve your budget.
- Recruit a campaign team representing key departments and all levels of your company. Educate your team members on United Way's role in the community.

Start Date: _____

End Date: _____

6 WEEKS BEFORE KICKOFF

NOTES

- Finalize goals and strategies with your CEO and campaign team.
- Lay out campaign plan (dates, theme, events, and incentives)
See page 12.
- Schedule volunteer projects and workplace presentations with United Way

4 WEEKS BEFORE KICKOFF

NOTES

- Notify your Director of RD of the campaign materials and additional United Way resources you'll need.
- Schedule impact experiences and workplace presentations with your Director of RD. If you are donating through e-pledge submit employee spreadsheet and email templates.

2 WEEKS BEFORE KICKOFF

NOTES

- Create energy and awareness. Begin publicizing your campaign. (Utilize your company's preferred channels of communication).
- Prepare your CEO video, email or letter to your employees. See Director of RD for examples.

1 WEEK BEFORE KICKOFF

NOTES

- Test online platform (for digital campaigns only).
- Send CEO video, email, or letter to your employees.
- Review event kickoff with your campaign team.
- Continue publicizing your campaign.

KICKOFF WEEK

NOTES

- Host your company-wide campaign kickoff event.
- Present information about United Way to all employees in presentations and staff meetings.
- Distribute pledge forms to all employees (for paper pledge campaigns).
- Be available to your campaign team and employees to answer questions.
- Continue building awareness and growing enthusiasm.
- Track and report progress.
 - Capture the excitement with lots of photos of employee engagement and participation.
- Thank your CEO for his/her support.
- Thank every *employee* for participating in the campaign.



We are happy to work with you to make sure the message about your United Way Campaign gets across to all of your employees. Please feel free to discuss your individual meeting needs with your United Way Director of Resource Development.

CAMPAIGN TIMELINE, CONTINUED

CAMPAIGN WRAP-UP

NOTES

- Collect all pledge forms (for paper pledge campaigns) Ask your campaign team to follow up with colleagues who may not have their forms. Collecting forms from every individual, regardless of if they will donate, confirms that every employee had the opportunity to give.
- Announce your final campaign results.
- Thank every employee for their contribution, again (verbal recognition, letter, email, small gift, celebration event, etc.).
- Conduct a campaign debrief with your team and Director of RD. Develop a summary for next year's campaign.
 - "Best Of Award" nominations

YEAR ROUND

NOTES

- Start a year-round communication program. Share United Way updates and news throughout the year to communicate the impact of their contribution.
- Subscribe to our monthly newsletter, follow us on Facebook, LinkedIn, and Instagram to stay current.
- Participate in other United Way events and initiatives to increase employee engagement like Make a Difference Day, Turkey Trot and Power of the Purse
- Promote your own internal special events for year round engagement (casual day, food events, volunteering activities, drives) .
- Get your soon-to-be retirees connected to Retire United so they can continue to serve their community after they leave the workforce.



Participate in volunteer opportunities year-round:
www.unitedwaymc.org/volunteer

MEETING GOALS

	Your Workplace Results Last Year	Your Workplace Goals-This Year
Participation Goal		
Total GIVING employees (Multiply your total employees by your participation goal)		
Set an "Average Gift" Goal		
Total Employee Goal (Pledge Forms) (Multiply your total GIVING employees by your "Average Gift")		
Corporate Giving		
Other "Fun-raiser" or Special Events (OPTIONAL. Do not make these a priority over giving via pledge forms and payroll deduction.)		
Total Workplace Campaign Goal		

**We
LIVE
Here.** | **We
GIVE
Here.** | **It
STAYS
Here.**



INCENTIVES

So you've set your goals. Now to achieve them! Participation rates and average giving levels don't just magically increase. Here are some proven tips to boost them to the next level by engaging your team in United Way.

When to use incentives

- Encourage first-time donors to make a gift
- Promote attendance at meetings or campaign events
- Persuade colleagues to turn in their pledge form by a certain date
- Encourage a pledge increase or leadership gift



Incentives if you DON'T have a budget

- Casual day stickers
- Prime parking spaces
- Pass for a long lunch
- Pass for sleep in late day
- Company merchandise/apparel
- Pot luck
- Traveling trophy for department with highest participation or percentage increase
- Car started & windows scraped every day for a week
- Donated items or gift certificates from vendors or local merchants

Incentives if you DO have a budget

- Candy
- Free food
- Vacation time
- Celebration or department lunch
- Movie passes
- Gift certificates
- Tickets to local sporting events or theatre events
- Weekend getaways
- Salon/Spa services
- Gas and car wash certificates

*Need more ideas?
Don't forget to ask your
United Way Director of
Resource Development
for some other
fun, new ideas!*

Where to get incentives

- Your company
- Your vendors
- Local businesses
- Managers or other employees
- United Way of Marathon County

GLAD YOU ASKED

Why give to United Way of Marathon County?

United Way is the most effective way to direct your charitable donations to address community needs of Marathon County. We connect resources to accelerate community wide solutions. By bringing area non-profits, government, business and volunteers together we improve people's lives by mobilizing the caring power of Marathon County.

How does United Way establish its focus on community issues?

Through community surveys and several years of research United Way of Marathon County identified the number one issue among Marathon County community members was financial stability. In response, United Way of Marathon County adopted the Bold Goal "Lift 10,000 community members to financial stability by 2033". As we invest in each other our community will thrive.

Why should I give to United Way?

- Charitable giving is a personal and voluntary decision and United Way of Marathon County encourages you to do what is most comfortable to you. A gift to United Way of Marathon County is an investment that benefits the entire community, not just one program, issue, or population.
- There are many valuable non-profit organizations in the area that you may care about. United Way provides an opportunity for your one gift to support a variety of local needs. If everyone designated their gifts to their favorite agency, many services to those in need would not be available to the community. Through one gift to United Way, you can accomplish so much good!
- You can also be assured that your gift to United Way of Marathon County goes directly to fund programs that help people most in need. United Way conducts periodic needs assessments to ensure donor dollars are addressing the most pressing community needs. We also monitor funded programs and initiatives quarterly to make sure they are efficiently and effectively improving people's lives and making a positive impact.
- Finally, contributing through United Way guarantees agencies funds they can rely on every month rather than depending on sporadic contributions.

CAMPAIGN RESOURCES



Please visit

our workplace campaign webpage for digital versions of all of our campaign resources.

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