



WHERE THERE'S OPPORTUNITY  
THERE'S A **WAY**

# Employee Campaign Coordinator Resource Guide



## THANK YOU FOR YOUR SUPPORT

2020 was a year like no other. Our community has been challenged in ways we never expected and so many of our neighbors still need our support. That's why we're looking to you—our strongest and most dedicated supporters—to help share the message of how the work of United Way is crucial.

By becoming an Employee Campaign Coordinator for your workplace's United Way of Pitt County annual campaign, you're helping to solve some of our community's toughest challenges. It takes a special person to manage a workplace fundraising campaign: a person with leadership skills, creativity, enthusiasm and compassion—a person who believes that together we can create a community where every person has an equal chance at a bright future.

With your help, we will put opportunity in the hands of all in Pitt County and will lift-up our neighbors! We do this when we invest in EDUCATION, EARNINGS, and access to the ESSENTIALS.

We hope this endeavor makes a difference in your life, as it has for so many others who have taken on this leadership role.

This resource guide is full of ideas and information to help you manage a successful campaign. Remember, we are just a phone call or email away with additional support and direction.

Thank you for making Pitt County a place where every child, individual and family thrives.

Sincerely,

Sue Tidd

[stidd@uwpcnc.org](mailto:stidd@uwpcnc.org)

Dwain Cooper

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# YOUR CAMPAIGN

## THE FIRST RULE OF FUNDRAISING

You raise money when you ask for it. Remember, you are providing the opportunity to make a difference and be part of a group of people committed to changing our community for the better. Don't be afraid to ask. Your focus is on people helping people. The most successful workplace campaigns have the early and full support of the company's CEO.

- Prior to beginning your campaign, meet with your CEO and other top executives within the organization.
- Establish a timeline and budget with CEO feedback.
- Ask your CEO to send personal correspondence (i.e. letter, email, payroll insert, etc.) to each employee asking for campaign support and contribution. United Way can provide customizable templates.
- Arrange for your CEO to speak at your campaign kickoff celebration.
- Ask your CEO and other top executives to be present at campaign meetings and attend campaign activities.
- Ask your CEO and other executives to join you in kicking off the campaign by making the first leadership pledge (\$500+).

## SETTING YOUR GOAL

A workplace goal provides an incentive to give and measure success. Set a workplace goal to encourage an increase in giving year over year. The worksheet included here can help you calculate your company's investment potential.

5 STEPS TO SET YOUR GOAL				
1	Calculate your company's total dollar potential using <b>one</b> of these two formulas	A. $.01 \times \text{total payroll}$	=	
		B. $.01 \times \text{average annual salary} \times \text{number of employees}$		
2	Amount raised last year			
3	Percentage of total potential achieved			
4	This year's goal			
5	Percentage of potential goal			

# CAMPAIGN PLANNING WORKSHEET

TASK	DATE COMPLETED	NOTES
Meet with your United Way Account Manager for a planning meeting.		
Obtain CEO endorsement and support.		
Appoint Workplace Campaign Coordinator and recruit campaign committee.		
Appoint Leadership Giving Chair and recruit leadership committee.		
Secure a corporate gift or corporate match commitment.		
Determine pledge tool online or paper forms		
Request CEO/management appearances at kickoffs, rallies, and presentations.		
Set campaign goal.		
Determine marketing and communications strategy.		
Choose campaign methods.		
Set incentives.		
Establish or continue leadership giving program.		
Plan special events (virtual or in person).		
Plan company leadership meetings and kickoff presentation.		
Send email communications to notify staff of campaign activities.		
Send letter from top executives to all employees encouraging participation.		
Calculate results to include total dollars, number of donors, number of employees and leadership givers.		
Report results to United way.		
Thank campaign committee and employees with events and letters. Be sure to report results.		
Invite all employees to sign up for the UWPC newsletter and follow-on social media.		

# ELEMENTS OF A SUCCESSFUL CAMPAIGN

## TEAM

- Recruit team members from all departments, levels, locations and professional talents.
- Include your United Way staff contact in team meetings.
- Include your Marketing and HR team for your internal communications plan.
- Review prior campaign practices and brainstorm new ideas with your team.
- Establish specific duties for each member and develop a strategy and timetable for reaching your fundraising goals.

## MARKETING

- Provide educational opportunities, such as company-wide campaign kick-off meetings.
- Identify an employee who is willing to provide a personal testimony through email or at presentations.
- Use employee publications, bulletin boards, email, newsletters, paycheck stuffers and social media to spread the message.

## INCENTIVES

- Set a company participation goal.
- Hold a raffle for everyone who participates (days off, gift cards, etc.).
- Hold competitions between stores, branches, locations or departments based on participation rate.
- Host a wrap-up party/event and thank everyone who participated.
- Hold special events like virtual golf tournaments, trivia contests and scavenger hunts.
- Monitor your campaign and report results.

- Keep regular totals and give progress reports to your team, United Way, and your CEO.

## KICKOFF

- Employee kickoff meetings are the most effective way to reach all employees and can take as little as 10 to 15 minutes.
- Start a great campaign by offering incentives to attend.
- Make sure employees know the purpose of the meeting in advance.
- Distribute materials ahead of meeting.
- Invite a United Way staff member or company executive to speak at the event.
- Ask your CEO to attend and publicly endorse the campaign.
- Show videos and client success stories.
- Share company-wide campaign goal and incentives.
- Keep the meeting lively, informative and fun.
- Make the ask!
- Thank employees for their participation and follow up with those who were not able to attend.

## APPRECIATION

- Recognize your team and others who volunteered their time.
- Thank employees for their participation, time and support; a thank you letter from the CEO is particularly effective.
- Publicize your results via email, newsletters and social media.
- Celebrate your success!

# ELEMENTS OF A SUCCESSFUL CAMPAIGN (continued)

## ENGAGEMENT

- Stay connected with us year-round to hear updates on our work. Sharing these updates will help make next year's campaign even more successful.
- Identify next year's Employee Campaign Manager and share their information with United Way.
- Start a new hire program that gives new employees the opportunity to make a contribution when they join your organization. United Way can help you get started.



## SAMPLE TIMELINE

### 1-2 MONTHS BEFORE YOUR CAMPAIGN STARTS

- Schedule a planning meeting with United Way.
- Create your campaign committee.
- Choose campaign dates.
- Plan your kickoff and fundraising events.

### 1 MONTH BEFORE YOUR CAMPAIGN STARTS

- Hold a meeting with your leadership team to get their support and participation in events.
- Share campaign dates and theme with staff.
- Schedule a speaker for your kickoff event through United Way.

### CAMPAIGN LAUNCH AND UP TO 2 WEEKS PRELAUNCH

- Post campaign collateral (*posters, flyers, one-pagers, etc.*) in newsletters, emails or your intranet. Send pre-campaign launch and campaign launch letters (*provided by United Way or customized*) via email, intranet, newsletter or all of the above; include video where applicable.
- Hold your kickoff meeting and share information about United Way and the campaign.
- Send emails directing employees to company pledge site.

### 2 WEEKS TO 1 MONTH AFTER CAMPAIGN

- Send thank you letter, along with results, to all donors.
- Conduct final count with United Way representative.



# SAMPLE EMAIL COMMUNICATIONS SCHEDULE

We make it easy to communicate with your employees by offering turnkey email templates that can be copied and pasted into your email browser. Visit [UWPCNC.org/campaign-tools](http://UWPCNC.org/campaign-tools) to download our customizable templates. If you need assistance, we are only a phone call or email away.

## UP TO FIVE DAYS BEFORE CAMPAIGN

Email 1: Introduction/Teaser/Theme

## DURING CAMPAIGN

The below are email theme examples which messaging can be designed around and sent every day of your campaign—from kickoff to the last day—based on a typical two-week campaign. Select messaging that you feel will resonate best with your workplace, your goals and the needs of your specific campaign.

Check the Workplace Email and CEO templates for additional email templates.

Email 2: Campaign Kickoff Announcement

Email 3: Importance of Campaign

Email 4: Give Now

Email 5: Incentives

Email 6: Diversity, Equity and Inclusion

Email 7: Community is Important Because...

Email 8: What Your Dollar Can Do (Creating Impact at every level)

Email 9: Update on Campaign Goal

Email 10: Focus on EDUCATION

Email 11: Engagement Activity

Email 12: Focus on EARNINGS (Self-Sufficiency information)

Email 13: How United Way Works (Where the money goes-Jamie)

Email 14: Focus on ESSENTIALS

Email 15: Last Chance to GIVE!

# MAKING THE ASK

## Group Solicitation

Group education and solicitation is the most efficient and effective method of reaching your goal of contacting every employee that has been assigned to you. At a group meeting, employees come together to hear a presentation and afterwards each is asked to make a pledge. Such a solicitation method has been proven to improve results. It also will considerably cut down on one-on-one follow-up.

### Pre-planning:

1. Check with your principal to set up the time, place and meeting agenda.
2. Make arrangements for a United Way Speaker.
3. Publicize the meeting well in advance.
4. Ensure that all pledge forms are available for distribution or **OPTION** for online pledging: have a laptop connected to your organizations online platform for people to access after the meeting.
5. Have food. Have fun!
6. Follow-up with those who did not attend the meeting.

### Sample Meeting Agenda:

Below is a sample agenda for a United Way group solicitation meeting that you should review with the group's manager before the meeting. An effective meeting requires no more than 15 to 20 minutes. The following is a suggested agenda.

1. **Welcome** and campaign endorsement by leadership. (1 minute)
2. **Thank** employees for attending, distribute materials. Remind employees to either sign and turn in forms when they leave or visit your organizations online pledge form. (3 minutes)
3. **Show Video** (1 ½ to 4 minutes) Available at the United Way's web site [www.uwpcnc.org](http://www.uwpcnc.org), click on CAMPAIGN CENTRAL and then click on CAMPAIGN TOOLKIT for access to campaign videos.
4. **United Way presentation** (4 minutes)
  - a. Explain how United Way works and why you volunteer for United Way.
  - b. Point out that United Way supports local health and human service programs in the community focused on (1) Education (2) Earnings and (3) Essentials.
  - c. Explain that United Way is a community leader working to identify and solve local problems, working in partnership with other community and civic organizations to make best use of limited resources.
5. **Review incentives** discuss the payroll deduction options available: online vs paper form. Suggest the fair share approach (one hour's pay per month) and remind them of any incentives and how to qualify for incentives. (3 minutes)
6. **Make the ask** (2 minutes) Sample scripted ask:
  - i. "If you have participated in the campaign last year, I want to thank you for your support and ask that you consider increasing your contribution for this year's campaign
  - ii. If you have chosen not to participate in the past, I encourage you to please join me and your co-workers working together to make our community a better place by making a contribution to United Way today"
7. **Closing** Summarize importance and conclude meeting with "PLEASE JOIN ME -Let's create more opportunities for EVERYONE!" (1 minute)

# MAKING THE ASK

## One-on-One Solicitation

The second form of education and solicitation is the one-on-one approach, where individual employees are contacted and asked to make a pledge. The following 5 step approach is the most effective one-on-one solicitation technique:

### Step 1: Make Your Introduction and Opening Comments

- Explain how United Way works and why you volunteer for United Way (see “Elevator Speech”)
- Show campaign video (1 ½to 4 minutes) available at the United Way’s web site [www.uwpcnc.org/campaign-tools](http://www.uwpcnc.org/campaign-tools) for access to various videos.
- Point out that United Way helps to support local health and human service programs in our community focused on (1) Education (2)Earnings and (3) the Essentials.
- Explain that United Way identifies issues affecting our communities and works in partnership with community leaders and civic organizations to address these issues.

### Step 2: Answer Questions

Answering questions about United Way gives you the opportunity to tell your fellow employees more about the work of United Way. See “Questions and Answers” section of this manual. If you are asked a question that you cannot answer, please call Sue Tidd (ext. 206) at the United Way (252) 758-1604 or send Sue an e-mail at [stidd@uwpcnc.org](mailto:stidd@uwpcnc.org). We will get the answer to you quickly so you can follow up as soon as possible.

### Step 3: Explain Pledge Process

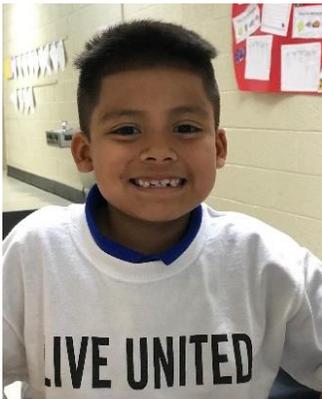
Review the pledge form or share the online web address for pledging and credit/debit card donation processing. [www.uwpcnc.org/pcs](http://www.uwpcnc.org/pcs) **Don’t forget to mention any incentives!**

### Step 4: Ask for a Gift

You’ve answered the person’s questions and explained the pledge form and incentives. Now you’re ready to ask for the pledge. Again, encourage each person to give a payroll deduction “fair share” gift and to give as generously as possible. A “fair share” gift is one hours pay per month.

### Step 5: Say Thank You...a lot!

Thank the person for his or her time and gift. Assure the individual that the contributions will be used to help people in need in our community.



## COMMONLY ASKED QUESTIONS and RESPONSES

### ***How do we know that our contributions are being used properly?***

Donating to United Way ensures careful screening and monitoring of funded programs that align and meet community-driven strategies. Program activity is monitored to measure success by local community volunteers and to ensure donations are having the desired impact in our communities.

### ***Why didn't my friend get help when he/she needed it?***

If you receive a complaint about a United Way partner, please get the facts and call the United Way office. Sometimes there is just no help available for a need; this is why your support is so vital.

### ***How much should I give?***

Giving is a personal matter based on your desire to help others, your interest in the community and your own financial ability. To help those who would like some suggestions, guidelines are included on employee pledge form regarding the Fair Share and Leadership Giving programs.

### ***Why should I give to the United Way when I could give directly to a specific agency?***

When you give to the United Way the impact of your gift is multiplied. Your gift is added to the gifts of other contributors and is distributed to programs that have a proven record of success right here in Pitt County. A group of community volunteers work to determine the best way to invest funds to create measurable impact in our community. When you give to United Way you can be assured that the dollars are going where they will efficiently and effectively help solve community problems.

### ***When will these donations begin?***

Confirm with your HR department for when payroll deduction is expected to begin.

### ***I already give/volunteer my time/ I give to my church.***

Thank you! I am glad you already understand the value of giving to our community. Let me show you how you can greatly increase your impact with just a small contribution. (Explain what a donation can accomplish).

### ***Why do you use the money we give to buy gifts?***

Your contributions are not used to purchase the gifts. All the money you donate through the campaign is sent to the United Way. The gifts are paid for by community-minded companies as a thank you for your support of the United Way.

### ***Can I designate my gift?***

Yes, donors can designate their gift to any charitable organization that is a federally registered 501 C 3 tax-exempt organization. They can designate by noting their intention on the pledge form. The designation must be at least **\$50 minimum**.

### ***How secure is the United Way's online credit/debit card option?***

The financial information is transmitted securely via encrypted link and at no time is any financial information stored on our servers/or website. The website only stores IP address and session information in a cookie. It does not store any other user information.

# MANAGING OBJECTIONS

You may, on occasion, encounter people who object to contributing to United Way. Keep in mind that objections are a natural part of the campaign and offer you an opportunity to present more information. Here are some insights into the psychology of objections and suggestions for handling them:

Potential donors may have questions concerning United Way of Pitt County or your workplace campaign. Your sincerity and personal commitment are the best tools to use when responding to an objection. Since most objections are based on misconceptions, respond with, *"If that were not an issue would you consider making a pledge?"* By providing the correct information, you can usually overcome the objection, which may lead to a pledge.

## Tips for Handling Objections

- **LISTEN** to what is being said. Listening promotes openness and acceptance.
- **ESTABLISH RAPPORT** Objections are not personal. Often, just talking to a person about why giving is important and finding out what that person's personal priorities are can ease the process.
- **DO NOT ARGUE** If you receive objections from someone you are soliciting.
- **BE YOURSELF** You have the ideas to present, so be straightforward in your presentation. Asking for someone's participation or gift is not a "win/lose" situation.
- **ANSWER OBJECTIONS WITH FACTS** Say thank you. Regardless of the prospect's response, always leave with a smile and a thank you.
- **DON'T BE AFRAID TO SAY "I DON'T KNOW"** Let those with questions know you'll get back to them with the answer. Tell them they can call United Way at (252) 758-1604 or visit the website [www.uwpcnc.org](http://www.uwpcnc.org).
- **REMEMBER TO THINK LONG-TERM** Every question provides an opportunity to communicate how United Way is building a stronger community for everyone in the County. You may not get the person to pledge this year, but you are planting the seeds for the future.

# TALKING THROUGH COMMON OBJECTIONS

Here are some effective responses to common objections:

## ***I live in a community outside of Pitt County. Why should I give?***

United Way of Pitt County member nonprofit organizations provide services not only to residents of Pitt County, but also to people living in surrounding regions. Consider giving to the United Way where you live to help residents in your community. You can also contribute to any nonprofit organization of your choice located anywhere around the world as long as they hold the designation as a 501 (c) 3.

## ***I give directly to XYZ charity/organization. Why should I give to United Way of Pitt County?***

Giving to United Way of Pitt County is the most efficient way to give because:

- When you contribute to United Way directly, you are investing in targeted solutions and programs within our community. You can also choose to contribute to United Way's Community Impact Fund, which focuses on making a significant impact in the areas of education, earnings, and the essentials.
- While you may give to other worthy causes as well, view your United Way gift as a "gift to the community" because it supports a network of member nonprofit organizations with wide-reaching impact throughout the whole community.
- United Way's annual campaign efforts give area nonprofit organizations a reliable source of funding without having to allocate scarce resources to solicit individual contributions. These organizations can count on United Way of Pitt County to cost-effectively promote and administer a single campaign that raises money for many causes at once.
- United Way adds value to your contribution by providing eligibility requirements for nonprofits' budgets and programs, ensuring that your gift is being used effectively.

## ***If I stop working for my current employer, what happens to my payroll-contribution pledge?***

Your pledge will not automatically be routed to your new place of employment or to your home. If you do change jobs ask your current employer if they run a United Way campaign and is it possible to set up payroll contribution through the new employer.

## ***My spouse gives for both of us, why should I give to United Way of Pitt County?***

Research indicates that donors perceive that one of the most significant benefits of personal giving is the feeling of being part of a collective effort to solve problems and make a difference in their community. Be a part of your workplace community by joining with fellow employees in the United Way effort.

## ***I'm never going to use these services, so why should I give?***

In 2019, 88,475 services were provided to people in our County by United Way-supported member nonprofit organizations. At one time or another, almost everyone has a health and human service issue and may need help. Most likely, you or someone you know has used services provided by United Way member nonprofit organizations such as the REAL Crisis Center, Meals on Wheels-Council on Aging, or Boys and Girls Club, NC 211 and many others.

## ***Some of our employees and their families are on tight budgets; should we invite them to be part of the campaign?***

Yes, most people appreciate the opportunity to participate. Giving through payroll contribution is easy and convenient. Payroll contribution allows everyone to participate by spreading the contribution over time. This allows those on tight budgets to participate and be part of the solution. Even a small amount per pay period makes an impact locally.

***How can I be sure my donation will be used efficiently and effectively?***

Every United Way is local and autonomous, including United Way of Pitt County. When you give where you live you support United Way of Pitt County's work, our programs and initiatives and our member nonprofit organizations that deliver services throughout the region, addressing challenges and deficiencies in the areas of education, earnings and essentials. United Way vets each of partner nonprofit organizations on a variety of criteria. Visit [uwpcnc.org](http://uwpcnc.org) to review a complete list of the eligibility guidelines.

- United Way employs a world-class financial reporting system. Independent audits have commended United Way with highly favorable reviews and unqualified opinions.
- Internal financial checks and balances were created to ensure United Way's stability and accountability. Community volunteer leadership meets quarterly to review financials to ensure your dollars are being used wisely.

Let's get started.