YOUR GUIDE FOR A SUCCESSFUL WORKPLACE CAMPAIGN

United Way of Lancaster County
1910 Harrington Drive, Suite A
Lancaster, Pennsylvania 17601
717.394.0731 phone
LiveUnitedLancaster.org
Mission
Mobilize the caring power of our community to achieve impactful, systemic social change within our county.

We Fight For:
- Education
- Income
- Health
of every individual in Lancaster County.

We identify the barriers that people are facing...
- lack of transportation
- lack of job skills
- cost of service
- access to care

We bring together organizations and individuals to address those barriers...
- Ten Collective impact Partnerships including over 300 organizations
- Volunteer Income Tax Assistance Program
- 211 Information and Referral Hotline

Together, we can...
- understand the root causes of community problems
- share solutions for lifting people up who need our help
- surround people with the services that will allow them to pull themselves out of illiteracy, unemployment, poverty and poor health
Dear Campaign Coordinator,

Thank you! By leading your company’s United Way campaign, you play a key role in making change happen in Lancaster County. We thank you for agreeing to serve in this crucial role; your work lies at the heart of the life-changing work United Way and our Collective Impact Partnerships are accomplishing in this community.

As a Campaign Coordinator, you will be supported by volunteers and United Way staff who bring the passion, expertise, and resources needed to get things done. During the campaign and throughout the year, you will have opportunities to tell the United Way story. You will help educate your co-workers about the impact United Way is making in their towns and neighborhoods.

This Campaign Coordinator Guide will equip you with the tools you need to share our message through your campaign. Consider it your own personal United Way resource — write in it, copy it, share it with your coworkers. Refer to it often during the Campaign and throughout the year as a source of information, best practices, and fresh ideas. And bookmark an online copy of this guide at LiveUnitedLancaster.org/Toolbox for a quick reference.

On behalf of United Way, thank you for accepting this key leadership responsibility to create lasting change in Lancaster County. As a Campaign Coordinator, you will truly empower your coworkers to help improve the lives of others who live and work in our community.

Thank you for investing your time to make a difference in Lancaster County.

Sincerely,

Stephen Nieli, CFA
Senior Vice President, Managing Director at PNC Wealth Management
2020-2021 Campaign Chair

<table>
<thead>
<tr>
<th>Your United Way Support Staff</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Vince Cronin</td>
<td>Business Development Associate</td>
<td><a href="mailto:Cronin@UWLanc.org">Cronin@UWLanc.org</a></td>
<td>717.824.8138</td>
</tr>
<tr>
<td>Emily Schaeffer</td>
<td>Administrative Assistant, RD</td>
<td><a href="mailto:Schaeffer@UWLanc.org">Schaeffer@UWLanc.org</a></td>
<td>717.824.8121</td>
</tr>
<tr>
<td>Sara Yoskoski</td>
<td>Leadership Giving &amp; Events Director</td>
<td><a href="mailto:Yoskoski@UWLanc.org">Yoskoski@UWLanc.org</a></td>
<td>717.824.8127</td>
</tr>
<tr>
<td>Barb Zercher</td>
<td>Resource Development Director</td>
<td><a href="mailto:Zercher@UWLanc.org">Zercher@UWLanc.org</a></td>
<td>717.824.8123</td>
</tr>
</tbody>
</table>
Follow these steps for a successful campaign. If you have any questions, don’t hesitate to contact your Resource Development staff member!

### 1. Know your United Way
- Become familiar with United Way’s role in the community
- Understand how United Way’s Community Impact Fund will make an amazing difference in Lancaster County by supporting collaboration
- Read your Campaign materials and be aware of how United Way’s Collective Impact Partnerships will help solve community problems

### 2. Involve your CEO
- Meet with your CEO to discuss the objectives of the campaign and the employee participation goal
- Ask your CEO to offer an opportunity to employees to be part of a company Day of Caring project
- Ask your CEO to allow time for a group presentation
- Demonstrate your CEO’s support with an endorsement letter to all employees and retirees
- Ask your CEO to approve incentives for campaign participants
- Ask your CEO to attend committee meetings and/or training, your kickoff event, and Leadership Giving meetings
- Ask your CEO to identify target leadership donors at your company
- Ask the CEO to appoint a coordinator for Leadership Giving
- Explain the benefits of a presentation to current and prospective leadership donors:
  - Sets an example of commitment
  - Raises early contributions
  - Recognizes exemplary corporate and individual support
3. Develop a strong campaign team
   - Invite coworkers from as many levels as appropriate: management, communications/PR, accounting, organized labor, professional/technical staff, support staff, hourly/part-time staff, and retirees
   - Ask your CEO to appoint a Company Campaign Chair who will follow the progress of the Campaign and assist in getting the "buy-in" needed
     - This person should be in senior management
     - He or she can also arrange for Leadership Giving meetings and/or solicitations
   - Seek ways to include your company’s leadership donors

4. Plan your campaign
   - Establish a campaign time line and determine your theme
   - Set a goal to increase employee giving total, average gift per investor, number of leadership donors, and/or number of investors
   - Develop an incentive plan to support objectives...if you're trying to increase the participation rate, consider offering an incentive for new investors; if you're trying to increase overall giving, an incentive for folks who increase their gift can help
   - Purchase or obtain incentive prizes from vendors, employees, etc.
   - Decide on your solicitation process (one-on-one or group)
   - Select dates and reserve rooms or send virtual links for employee and leadership presentations
   - Plan kickoff event and activities
   - Check United Way of Lancaster County’s Campaign Coordinator Toolbox at LiveUnitedLancaster.org/Toolbox for e-mail templates, sample CEO support letters, artwork for payroll stuffers and posters, event ideas, and other tools to make your campaign a success!
5. Review your last campaign

- Meet with your Resource Development staff member and/or Loaned Representative to discuss results from the 2019-2020 campaign, new campaign strategies, and best practices to achieve success
  - Confirm your total number of employees
  - Confirm your total dollars raised
  - Determine your average gift and number of investors
- Identify current and potential leadership donors for solicitation
- Schedule leadership thank you/solicitation event/presentation
- Strive to be a Circle of Honor recipient by reviewing the 2020-2021 application to help you set your goals; suggestions include:
  - Solicit 100% of employees
  - Increase dollars raised (by $X)
  - Increase number of investors (by X) or maintain 100% participation
  - Increase number of leadership donors (by X)

6. Promote your campaign

- Display United Way posters and materials wherever appropriate (our toolkit has digital versions)
- Announce campaign and campaign team in your company newsletter, through your company’s e-mail/intranet messages, and on your bulletin boards
  - Use these communications channels regularly to share campaign progress with employees
  - The United Way Toolbox has lots of ideas and support materials.

7. Conduct your campaign

- Coordinate employee and leadership meetings with your United Way representative
- Display campaign activities and information in prominent locations
- Send your CEO’s endorsement letter to all employees
- Conduct a kickoff event that includes your CEO
- Hold activities, special events, and fundraisers (check out our new virtual event ideas in our special event packet)
8. Ask for the gift
Research proves that people give because they are asked. If your colleagues are not asked to give, they may not give. Success depends on the ask. There are several ways to do this:

• **Group Solicitation** – This is the easiest way to ask for a gift. Virtually or physically assemble your colleagues by department or shift; present our campaign video; invite your CEO or other key employees and a United Way representative to speak; distribute pledge forms.

• **One-to-One Solicitation** – This method allows for a personalized approach to investors and allows you to reach employees who cannot attend group meetings. Solicitor training offers the tools to make you comfortable with this kind of ask; ask your United Way representative for more information.

• **Outreach to Retirees** – Send a letter from your CEO, a pledge form, and a return envelope to retirees asking for their participation.

9. Wrapping up

• Collect ALL pledge forms; check for completeness (calculations, date, signatures, etc.)

• Distribute incentives; publicize winners

• Report your results to your United Way Resource Development staff member and/or Loaned Representative using the Pledge Summary Report

• Complete your Circle of Honor application and return to your Resource Development staff member or Loaned Representative

10. Thank investors for your campaign success

• Thank your CEO and management staff

• Thank your leadership donors

• Thank all of your employees and retirees

• Thank your campaign team/committee

• **Pat yourself on the back for a job well done!**
Don’t Forget to Say “Thank You!”

After a successful campaign, it is very important to say “thanks” to all the employees who helped make your campaign a success. People want to feel appreciated when they have done something positive, and helping the community by giving to United Way of Lancaster County is no exception. There are many different ways to say thank you to all of your coworkers who helped make it possible:

- Pens, hats, t-shirts, or note pads with United Way’s logo on them
- Coupons for free dessert from company cafeteria
- Voice mail/e-mail/bulletin board postings saying thank you to contributors
- Payroll inserts saying “Thanks!”
- A thank you breakfast hosted in the cafeteria or conference room
- Food treats, along with a personalized note from the CEO
- Afternoon pick-me-up or snack
- Pizza party or food truck in your parking lot
- Brightly colored balloons tied to each contributor’s chair

Remember to thank each individual who contributed to and volunteered with this year’s campaign, vendors who supplied incentives or refreshments, members of organized labor (if applicable), and speakers, solicitors, and others who helped with the campaign.

Remember, the more personal the thank you, the more it is appreciated.

Become a Circle of Honor Award Winner

Since 2011, United Way of Lancaster County has been celebrating those special organizations who support our mission in an extraordinary way. The annual Circle of Honor Award recognizes the quality of a company’s workplace campaign, employee support of and participation in United Way activities, financial contributions and other non-monetary contributions. The businesses that receive this honor are the star supporters of United Way of Lancaster County and champions of the mission to GIVE, ADVOCATE, VOLUNTEER and LIVE UNITED. The Circle of Honor application can be used as a resource for campaign best practices and your road map to success!

Year-round Communication

Many people hear about United Way only once a year—when they are asked to give. Posters, newsletter articles, and fast facts remind employees how their gift helps in the Lancaster community throughout the year.

- Establish a committee to plan year-round volunteer opportunities
- Communicate to employees the impact of their contributions
- Promote the United Way website, Facebook and Twitter pages
- Utilize payroll stuffers, posters, and newsletters; use or adapt United Way campaign materials
- Coordinate a new-hires program with the employee orientation process
RISING TO NEW LEVELS

Tocqueville Society ($10,000 and more)

The Tocqueville Society is a very special group of committed philanthropists around the world who invest at least $10,000 annually in their United Way. We founded our Society in 1993 to afford leading, local contributors a vehicle to deepen their understanding of our community’s needs and connect with other philanthropists to make change happen in Lancaster County. Our Tocqueville Society members invest over $600,000 annually in our community.

Legacy Society

Legacy Society members are an important group of individuals and couples who have included United Way of Lancaster County in their planned giving. These forward-thinking philanthropists pay forward some of their success by investing in a nonprofit organization that has demonstrated its ability to remain relevant in supporting community needs. A lifetime gift to United Way is an investment in making great change happen for decades to come.

Leadership Society ($1,000 - $9,999)

Leadership Society members are generous donors to United Way of Lancaster County who give between $1,000 and $9,999 annually. They are recognized as Lancaster County’s philanthropic role models. When investors become Leadership Society members, they make a powerful statement about their desire to care for and strengthen our community.

Women United

United Way of Lancaster County’s Women United has raised more than $1 million since its founding more than ten years ago. Setting an example for the community and the next generation of women philanthropists, this group recognizes and encourages philanthropy and leadership by women who invest $1,000 or more annually. Members historically direct these investments to support impactful work that promotes women’s education, financial stability and health.

Emerging Leaders United

Lancaster County’s future rests in the hands of today’s Emerging Leaders. These philanthropists, age 40 and under, have actively engaged in their community by volunteering and advocating for a better Lancaster County.

Members of each of these groups enjoy year-round communication about the impact of their investments, an invitation to our annual leadership giving reception, recognition in our annual leadership giving report, and special activities provided to enrich their experience with United Way.
A campaign that is fresh and fun makes your job more enjoyable and creates more awareness among your coworkers. Here are some ideas and events to help you make your employee campaign more exciting and effective. Special events should enhance your workplace campaign, not replace it. Not all special events need to be fundraisers; it is equally important to educate and take time to thank everyone. Additional ideas can be found at LiveUnitedLancaster.org/Toolbox.

**Baby Picture Contest**
Employees bring in a baby picture of themselves and the staff guesses who is who. Charge an entry fee for employees to submit their guesses. The person with the most correct answers wins.

**Basket Auction**
Ask each department to sponsor, create, and fill a theme basket (spa day, movie night, chocolate, golf, cooking, etc.) Baskets are auctioned to the highest bidder with proceeds donated to United Way.

**Vacation Day**
Employees “buy” a vacation day. When an employee chooses to participate, their wages from a day’s work are deducted from their paycheck. Your company may choose to match the amount deducted, donating all proceeds to United Way. Additional vacation days can be offered if your organization meets its overall campaign goal.

**Casual Day**
Sell Casual Day badges entitling employees to dress casually on a pre-determined day. Or if your workplace is casual dress, have an “Un-Casual Day” where employees can pay a nominal fee to dress more formally. We recommend that you define what is meant by “casual” and notify visitors of the purpose of the day.

**Penny Wars**
Divide your workplace into teams and provide each team with a large container that they can decorate. Put pennies in your team’s container to increase the score and sabotage other teams by adding silver coins and paper bills, which decrease their score. Total each container, determine the winning team and donate the money to United Way.

**Tailgate Party**
Consider creating a sports theme for your campaign since United Way’s campaign period coincides with football season. Sell football fare from a truck in the parking lot “tailgate” style. Organize a tag football game with participants donating an entry fee and observers engaging in friendly wagers on the outcome.
MAKE IT FUN!

SOME OVERALL CAMPAIGN THEME IDEAS

- United Way “American Idol”
- Rock-n-Roll
- Paint a Brighter Tomorrow
- Join the Winning Team
- Rise to the Challenge
- Score a Touchdown
- Beach Party
- Shoot for the Stars
- A Movie (i.e. “The Hunger Games”)
- Fall Holiday (i.e. Labor Day, Halloween)
- Recipe for Caring
- Be a Super Hero
- Monopoly
- Corporate Karaoke
- Dunk Your Boss
- Company Car Wash

INCENTIVE & PRIZE IDEAS

- Bonus vacation days
- Dress-down days
- Sports or area event tickets
- Executive parking
- Gift certificates donated by local businesses
- Longer lunch periods
- Sleep-in-late or leave-work-early coupons
- Day off to volunteer
- Cafeteria coupons
- Lottery tickets
- Goodie bags
- Movie passes
- Company giveaways