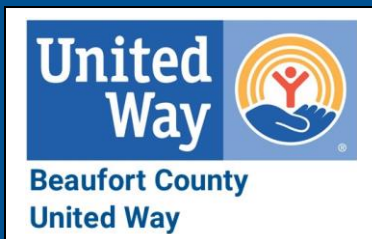


EVERYONE deserves the opportunity to **THRIVE**



Employee Campaign Leader Resource Guide



Helping Community Matters

THANK YOU FOR YOUR SUPPORT

The past few years have been 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 Leader for the United Way annual workplace 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 Beaufort County and will lift-up our neighbors! We do this when we invest in EDUCATION, SELF-SUFFICIENCY, HEALTH and access to BASIC NEEDS.

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 Beaufort County a place where every child, individual and family thrives.

Sincerely,

Sue Tidd stidd@unitedwaybc.net

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 company leadership.

- Prior to beginning your campaign, meet with your company leadership and other team members within the organization.
- Establish a timeline and budget with leadership 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 company CEO to speak at your campaign kickoff celebration or prepare a video message.
- Ask the leadership team members to be present at campaign meetings and attend campaign activities.
- Ask your CEO and other leadership team members 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 one 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 GM endorsement and support.		
Identify Chair and Co-Chair		
Recruit Employee Campaign Leadership committee members and invite to first planning meeting.		
Set campaign goal!		
Finalize pledge paper forms		
Set incentives.		
Confirm company match commitment.		
Determine marketing and communications strategy.		
Request GM & Leadership Management Team appearances at kickoffs, rallies, and presentations.		
Plan special events		
Establish or continue leadership giving program.		
Plan company leadership meetings and kickoff presentation.		
Send email communications or launch planned communications methods to notify staff of campaign activities.		
Send letter from GM to all employees encouraging participation.		
Calculate results to include total dollars, number of donors, number of employees and leadership givers.		
Thank campaign committee and employees with events and letters. Be sure to report results.		
Invite all employees to sign up for the BCUW electronic newsletter and follow-on social media.		

ELEMENTS OF A SUCCESSFUL CAMPAIGN

TEAM

- Recruit team members from all departments, levels, locations and professional talents.
- Include United Way staff contact in team meetings.
- Include your Marketing and HR team for your internal communications plan.
- Review prior giving history, 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, electronic displays, paycheck stuffers and social media to spread the message.

INCENTIVES

- Set a company participation goal.
- Hold a raffle for everyone who participates (days off, parking space, gift cards, etc.).
- Hold competitions between departments based on participation rate.
- Host a wrap-up party/event and thank everyone who participated.
- Hold special events like trivia contests and scavengerhunts.
- Monitor your campaign and report results.

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

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 leader to speak at the event.
- Ask your GM 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 GM 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 Leaders 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.
- Promote Retire United to those who are retiring. Retire United encourages retirees to stay active and continue to give back to their communities by volunteering.



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. 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.

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- VOLUNTEER CHALLENGE

Email 12: Focus on SELF--SUFFICENCY

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

Email 14: Focus on HEALTH

Email 15: BASIC NEEDS

Email 16: Last Chance to GIVE!

Share the impact donors will have on people in the community.

\$1.92 a week supplies 400 meals to individuals and families who are food insecure access to healthy meals from the food pantry.

\$4.03 a week provides 3 nights in a motel for a family who is experiencing homelessness, with an assessment of their situation, and connecting them to local resources.

\$9.61 a week 14 adults with 4 months of tutoring in reading, writing, English, mathematics, and specialty areas such as GED and citizenship testing.

PLEDGE FORM

How-to Complete

Pledge Form Sections

DONOR INFORMATION

Have employee check their information on the form to ensure it is correct. Ask that they include their email and a phone number in case United Way should need to follow-up with them.

LOCAL PEOPLE HELPING LOCAL PEOPLE

DONOR INFORMATION

Name: _____

Home Address _____

City: _____ State: _____ Zip Code _____

Email: _____

Phone: _____

GIFT INFORMATION I am making a: (select an option)

CareShare *Payroll Pledge equal to 1 hour's pay per pay period.
\$ _____ per _____ # pay periods **Total Gift \$** _____

***Payroll Pledge** of _____ *payroll pledge deductions begin Jan 2023
\$ _____ per _____ # pay periods **Total Gift \$** _____

One-Time Payroll Deduction of \$ _____ (first pay period Jan 2023)

Gift of CASH or CHECK in the amount of \$ _____

I choose not to participate at this time.

Signature: _____ Date: _____

INVESTING IN COMMUNITY

No selection is necessary! If you do wish to designate your contribution a minimum donation of \$50 is required when selecting an organization other than Beaufort County United Way. The organization must hold the federal nonprofit designation of 501(c)3. If no selection is made the donation will remain with the Beaufort County United Way.

Invest my gift to make a local impact.

Beaufort County United Way

Another United Way: _____

Other 501(c)3 organization name and address: _____

UNITED WAY GIVING COMMUNITIES

Each of our giving communities offer opportunities for you to connect with other like-minded people and learn about the issues facing our community. Members of our **GIVING COMMUNITIES** invest out of a sense of wanting to do good and improve their community.

When we LIVE UNITED, we can face our community's challenges head-on.



EMERGING LEADERS 365 give \$1 a day for 365 days. Investing \$365

CHANGE MAKERS gives \$10 a week for 52 weeks. Investing \$520

COMMUNITY BUILDERS gives \$100 a month for a year. Investing \$1,200

LIVING UNITED PARTNERS give \$100 a week for a year. Investing \$5,200

THANK YOU FOR INVESTING IN YOUR LOCAL COMMUNITY.

GIFT INFORMATION

Have employee select a gift option.

CareShare: is a pledge option through payroll deduction. A CareShare gift is equal to one hours pay per pay period

Payroll Pledge: employee will write the dollar amount to be donated followed by the number of pay periods.

One-Time Payroll Deduction: employee will enter the total gift amount that will be deducted the first pay period in 2023

Gift of Cash or Check: Have checks made out to Beaufort County United Way then attach check or cash to the pledge form.

OPTION: Ask that forms be returned signed even if the employee opts not to give. The purpose is to ensure that all employees had the opportunity to participate if they choose. If an employee chooses not to return the form, we will respect their decision.

INVESTING IN COMMUNITY

Donors may direct their gift if they so choose, however, no selection is necessary. If the donor wishes to designate their gift, a minimum contribution of \$50 is required when selecting an organization other than the Beaufort County United Way. The organization must hold a 501 (c) 3 nonprofit designation. If no selection is made the donation will remain with the Beaufort County United Way.

UNITED WAY GIVING COMMUNITIES

The Beaufort County United Way is transforming leadership giving levels to Giving Communities. Throughout the year, members will have the ability to connect with other like-minded people, receive information on opportunities to be hands-on in the community, and learn about the issues facing our communities.

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.
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) BCUW has a video option.
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) Self-Sufficiency (3) Health and (3) Basic 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 CareShare approach (one hour's pay per pay period) 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 previously, 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 -because EVERYONE deserves the opportunity to THRIVE!" (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
- Show campaign video (1 ½ to 4 minutes)
- Point out that United Way helps to support local health and human service programs in our community focused on (1) Education (2) Self-Sufficiency (3) Health and (3) Basic 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 at the United Way (252) 975-6209 or send Sue an e-mail at stidd@unitedwaybc.net. We will get the answer to you quickly so you can follow up as soon as possible.

Step 3: Explain Pledge Process

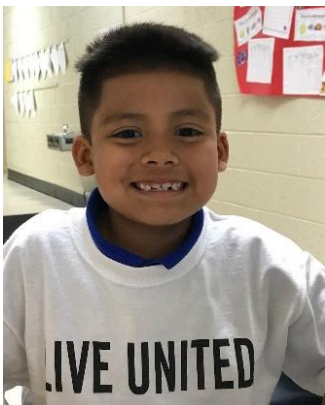
Review the pledge form and review giving options of pledging, check or cash. **Don't forget to mention any incentives!**

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 "CareShare" gift and to give as generously as possible. A "CareShare" gift is one hours pay per pay period.

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 invested back into our local communities.



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 CareShare and Giving Community 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 Beaufort 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. JANUARY 2023

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 Beaufort County United Way 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 Sue Tidd at United Way at (252) 795-6209 or email Sue at stidd@unitedwaybc.net.
- **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 Beaufort County. Why should I give?

Beaufort County United Way member nonprofit organizations provide services not only to residents of Beaufort 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 Beaufort County United Way?

Giving to Beaufort County United Way 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, self-sufficiency, health and basic needs.
- 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 workplace 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 Beaufort County United Way 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 Beaufort County United Way?

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, 21,312 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 organization.

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 Beaufort County United Way. When you give where you live you support Beaufort County United Way's work, our programs and initiatives and our nonprofit partners who deliver services throughout the region, addressing challenges and deficiencies in communities. United Way vets each of partner nonprofit organizations on a variety of criteria.

- 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 to review financials to ensure your dollars are being used wisely.

Let's get started.