



**UNITED WE FIGHT.  
UNITED WE WIN.**  
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### Setting Up a New Workplace Campaign

July 28, 2020

United Way of the Benzo Valley 

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### Purpose of Today:

- Connect you with the mission of United Way and build excitement for our work
- Provide initial guidance in starting a new workplace campaign at your company.

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### Introductions

#### The Resource Development Team

<p>Alison Prince, <i>President &amp; CEO</i></p> <p>979-696-4483 x101 979-220-3046 (cell) aprince@uwbv.org</p> <p>Maggie Gray, <i>Coordinator – Donor Relations</i></p> <p>979-696-4483 x118 mgray@uwbv.org</p>	<p>Norma Noonan, <i>Coordinator – Donations Management</i></p> <p>979-696-4483 x118 nnoonan@uwbv.org</p>
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United Way of the Brazos Valley fights for the health, education, and financial stability of every person in the Brazos Valley.



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### Supporting United Way...

- Allows any person to be philanthropic and shows the power of COLLECTIVE GIVING!
  - \$1 to United Way compounds into millions
- Gives donor the opportunity to maximize their giving through 1 gift.
- Supports community and social services that are MORE CRITICAL THAN EVER due to impacts of COVID-19.



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### 2020-2021 Community Campaign

- General Timeline:
  - Fall: Campaigns (Sign up/Pledge Period)
  - Spring (April): United Way finalizes reports and campaign numbers
  - Jan – Dec: Collection of Pledges
- Work with ~120 companies to run Employee Workplace Campaigns
  - Employee invests a portion of every paycheck (through payroll deduction) in our community.
  - Most managed locally, some are not.



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## Workplace Campaigns

- 2-3 week period
  - Kick-off Effort: event, email, video
  - Campaign Rallies with employees to share United Way message and allow employees opportunity to complete Pledge Forms
  - Fundraiser Activities: recommended after Pledge Forms are completed

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## Campaign Toolkit

- <https://uwbv.org/campaign-toolkit/>
  - Links to training materials
  - Internal Coordinator Guidebook
  - Digital Workplace Campaign Guide
  - Promotional posters and sample email communications
  - Links to videos for running campaign rallies
  - Helpful planning tips on various aspects of campaign

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## Three Phases of Campaign

Internal Coordinator Guide, Pgs. 10 & 11

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## Getting a New Campaign Started

1. Confirm Leadership/Corporate Support
2. Set-up details with HR/Payroll Department
3. Identify Internal Coordinator/Committee (July 28 @ 10am)
4. Plan the activities (July 30 @ 10:30)
5. Report the Results to United Way




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## Leadership/Corporate Support

- Locally Owned/Managed:
  - Voice of Support / Blessing
  - Confirm Corporate Gift / Match / Giving Incentives
- Non-local Management / Corporate Structure:
  - Confirm Support
  - Confirm if existing systems are in place for United Way campaign
  - Confirm Corporate Gift / Match / Giving Incentives




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## Corporate Gifts, Matches or Incentives

- Corporate Gifts – an amount the Corporation donates directly or through foundation / grant process
- Corporate Match – match to employees giving, \$1:\$1, \$.50:\$1, etc.
- Giving Incentives:
  - Fair Share Day – extra day off for those who give 1% of salary
  - Raffle Drawing Items – select prize drawn from those who complete a pledge form
  - Exclusive Experiences:
    - Reception/Lunch with CEO for Leadership Givers (\$1,000+ annually)
    - Company-provided meal with 100% participation
- View as Teambuilding Opportunity




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## Checklist for HR/Payroll

- Prepared for Payroll Deductions in payroll system
  - Paper Pledge Forms
  - Digital Pledge Forms
  - Use/Develop own Pledge Forms
- Confirm dates Payroll Deductions will begin/end (Recommend 1/1/2021)
- Confirm payment to UWBV method – monthly or quarterly
  - Mailed directly from your site, or another location/United Way
  - Does UWBV need to provide invoice/documentation to issue payment?
- Received a copy of all payroll deduction pledge forms at the end of pledge period

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## Pledge Forms

- Paper Pledge Forms or Digital Pledge Forms (customizable)
- Methods to Give:
  - Payroll Deduction
  - One-Time gift of cash, check, credit card or payroll deduction
  - Online @ [uwbv.org/donate](http://uwbv.org/donate)
- UWBV's Paper Pledge Forms: Triplicate copies
  - Donor
  - Payroll Office
  - United Way

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## Pledge Form

**DONOR** (please print):  
 Mr./Ms./Mr. / M / Ms / Lt  
 Home Mailing Address: \_\_\_\_\_  
 Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Email (please add acronym): \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Employer Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**PAYROLL DEDUCTIONS**  
 I want to direct the following amount per paycheck:  
 Give Per Paycheck: \$100.00 \$25.00 \$50.00 \$75.00 \$100.00 Other \$ \_\_\_\_\_  
 Pledge Per Year: \$1200.00 \$300.00 \$600.00 \$900.00 \$1200.00 Other \$ \_\_\_\_\_  
 I pledge \_\_\_\_\_ % of my salary for a total of \$ \_\_\_\_\_  
 (A gift of \$100 or more will automatically qualify you for membership in the Leadership Giving Society. You would join this year when it is issued.)

**ONE-TIME GIFT**  
 Please accept my one-time gift of \$ \_\_\_\_\_  
 My cash gift is enclosed.  My PAYROLL DEDUCTION.  
 My CHECK is enclosed.  Please CHARGE my card.  
 Check number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ CVV: \_\_\_\_\_ (Do not write for my gift)

**LEADERSHIP GIVER**  
 Your investment of \$1000 or more will automatically qualify you for membership in the Leadership Giving Society. You would join this year when it is issued.

**THANK YOU!**  

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## Report the Results to UWBV

- Complete Pledge Report Envelope (Paper, PDF or Digital) – HR/Payroll or Internal Coordinator
- Enclose all Pledge Forms, Cash, Checks, documentation
- Submit to United Way:
  - Call for Pick-Up
  - Drop by United Way office
  - Mail (not recommended if enclosing cash or credit card information)

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**WHEN COMPLETED, PLEASE FORWARD TO UNITED WAY IMMEDIATELY!**

Company \_\_\_\_\_ No. of Employees \_\_\_\_\_  
 Billing Address \_\_\_\_\_  
 City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone Number \_\_\_\_\_  
 Name of Preparer of Report \_\_\_\_\_  
 Email \_\_\_\_\_

This report is:  Partial (additional reports to follow)  Final

Instructions: Please complete the following chart for only the information enclosed in this envelope.

1	Giving Option	Total Pledge Amount Enclosed (\$)	# of Givers	Instructions
a)	Payroll Deductions			A. Enclosed: Whole copy of Pledge Form to Payroll Dept. B. Enclosed: Whole copy of Report Form to United Way C. Enclosed: Whole copy of Report Form to United Way
b)	Cash/Checks/One-time Gifts			A. Enclosed: Whole copy of Pledge Form & cash, checks B. Enclosed: Whole copy of Pledge Form to United Way
c)	Credit Card Gifts			A. Enclosed: Whole copy of Pledge Form with all credit card information B. Enclosed: Whole copy of Pledge Form to United Way
d)	Other (Online Gifts)			A. Enclosed: Whole copy of Pledge Form to United Way B. Enclosed: Whole copy of Pledge Form to United Way
e)	Fundraisers / Special Events			A. Enclosed: Whole copy of Pledge Form to United Way B. Enclosed: List of fundraiser events & amounts raised from each, if multiples
2	Sub Total			Sum of lines a + b + c + d + e
3	CORPORATE GIFT / MATCH			Enclose copy of Pledge Form to United Way
4	GRAND TOTAL		N/A	Sum of lines 2 + 3

Signature of Preparer: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**THANK YOU!!**

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## United Way Review and Next Steps

- Audit all totals to confirm amounts.
- Communicate to name on envelope any inaccurate information.
- Enter pledge information into donation system.
  - Process credit card payments, black out numbers once processed
  - Deposit cash, checks
  - Issue receipts via email/letter
- Efficient communication to United Way is critical in providing a strong donor experience

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### Charitable Contribution Documentation

- Payroll Deductions:
  - Donor retains copy of pledge form and W-2 to document charitable gift for IRS.
  - UWBV does not provide receipts for total payroll deduction received.
- Cash:
  - Email/Paper Receipt provided when Pledge Form is provided with gift.
- Checks:
  - Email/Paper Receipt provided (use Pledge Form documentation or check information)




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### Payments to United Way

- Paid Monthly or Quarterly based on previous period's payroll deductions
- Do not need to provide individual's documentation of deductions
- Please document a payment number system on check:
  - Example: Employee Deduction Payment 1/12 or 1/4
  - Example: Corporate Match 1/1 or Corporate Match 1/4
- EFT possible, but please send form of contribution documentation




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### Ongoing Campaign Efforts

- Evergreen Campaigns
  - Incorporate United Way information into Employee On-Boarding
  - Provide opportunity to "opt-in" at time of employment and complete Pledge Form
- Volunteer Engagements
  - United Way Volunteer Events: Day of Action, Book Bash, Reading Day, etc.
  - Unique events organized for your company




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## CAMPAIGN CHECKLIST

**1-4 Weeks - Before Kickoff**

- Assign a campaign committee chair and a campaign committee
- Meet with and obtain CEO support of campaign

**5 Weeks - Before Kickoff**

- Create campaign strategy (message, committee roles, goals, assets, etc.)
- Develop internal and external communications plan
- Develop publicity and activation plan

**6-8 Weeks - Before Kickoff**

- Start planning your committee meetings & campaign roll out
- Complete internal communications and development tasks and obtain CEO representation
- Develop internal communications plan for the campaign
- Arrange for an agency or vendor with your United Way representative

**9-10 Weeks - Before Kickoff**

- Sign campaign agreement
- Obtain CEO approval of campaign
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign

**Campaign Kickoff & Post-Kickoff**

- Hold campaign kickoff meeting with CEO, committee, internal, agency partners and United Way representatives
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign

**Post-Kickoff**

- Hold committee meetings
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign
- Complete internal communications plan for the campaign

**Final Report**

- Submit final campaign report to United Way office
- Complete internal communications plan for the campaign

**CAMPAIGN NOTES**

MY UNITED WAY REPRESENTATIVE: NAME \_\_\_\_\_ PHONE \_\_\_\_\_

CAMPAIGN DATES: \_\_\_\_\_

CAMPAIGN GOAL: \$ \_\_\_\_\_

CAMPAIGN COMMITTEE MEMBERS: \_\_\_\_\_

SPECIAL EVENTS: \_\_\_\_\_

INCENTIVES: \_\_\_\_\_

KICKOFF / PRESENTATIONS SCHEDULED: \_\_\_\_\_

NOTES: \_\_\_\_\_

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## Next Trainings

**Reminder: Internal Coordinator Virtual Trainings:**

- **July 30 10:30 am:** Overview of the Internal Coordinator Role and Workplace Campaign Planning
- **July 30 @ 2 pm:** Getting Creative with Fundraiser Activities in a Socially Distant Workplace

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## Next Steps

- Contact Maggie to schedule a planning session for your campaign
  - [mgray@uwbv.org](mailto:mgray@uwbv.org)
  - We will review the planning process and help you in your efforts
- Build your team and engage your Leadership

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THANK YOU!

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