2019-2020 WORKPLACE IMPACT COORDINATOR HANDBOOK

CFC Code 31408
Give Directly to United Way NCA #8000

UnitedWayNCA.org
### Table of Contents

- **4** Role of the Impact Coordinator
- **5** Ten Steps for Successful Engagement
- **6** Managing Objections
- **10** Leadership Giving
- **11** Kickoff Rally
- **12** Campaign Builder
- **14** Prizes and Other Incentives
- **15** Employee Pledges – Making the Ask
- **16** Build Strong Teams Through Workplace Volunteerism
- **18** Campaign Planning Worksheet
- **19** How to Complete the CRE
- **20** Putting Pledges into Action: Your Payment Schedule
- **21** Say Thank You
Congratulations! You have been selected for an important role -- Workplace Impact Coordinator.

On behalf of United Way of the National Capital Area, I applaud your hard work and your dedication to helping our community.

Your workplace campaign helps United Way NCA and our hundreds of member nonprofit organizations meet critical community needs in the areas of education, financial stability and health. In addition, because we recognize the importance of preparing people for successful careers, we have infused a focus on workforce readiness in each of these target areas. You can learn more about our work at UnitedWayNCA.org.

To make a significant impact in the community, we do the following:

• Efficiently raise and allocate funds to support a strong network of hundreds of quality member nonprofit organizations that provide needed services throughout the region.

• Offer individuals and local businesses an easy and meaningful way to support those causes of greatest interest through workplace campaigns and other giving opportunities.

• Convene community leaders and volunteers to identify and address critical, unmet needs through focused grants, collaborations and other initiatives that impact the community.

Thank you again for choosing to be part of the solution. This handbook will provide you with instructions and advice to assist you in leading your workplace campaign. Use the clickable links for more information.

Your United Way NCA representative is ready to answer any questions you may have and offer our support. We are all here to help you.

Rosie Allen-Herring
President and CEO
United Way of the National Capital Area

[Image: Communities we serve]
ROLE OF THE IMPACT COORDINATOR

The Importance of Being an Impact Coordinator

As an Impact Coordinator your primary role is to plan, coordinate and implement an effective United Way NCA workplace campaign. Emphasize the significant challenges that underserved populations in our region face every day to your colleagues and inspire them to make a commitment to Live United.

YOUR RESPONSIBILITIES INCLUDE:

MANAGE

• Attending ECC training or strategy meetings offered at the beginning of each campaign season.
• Working closely with your United Way NCA Representative to develop an effective campaign plan.
• Recruiting a campaign committee from key areas of the organization.
• Coordinating the distribution of campaign materials and the collection of pledge cards.
• Communicating the specifics of your electronic campaign, including informing your United Way NCA Representative via email of the date on which you want your donor website to be activated, when you will send your electronic donor file, when you want the donor website to be shut down and when you will need the final payroll file.
• Coordinating kickoff and recognition events.

PROMOTE

• Promoting the campaign within your organization.
• Publicizing results throughout the campaign.
• Holding a separate meeting for Leadership givers and prospects.
• Providing all associates and retirees the opportunity to give.

COMPLETE

• Thanking donors and volunteers for their generosity.
• Completing the campaign by submitting the Campaign Reporting Envelope (CRE) and pledge forms to United Way NCA’s administrative office.
• Evaluating and making recommendations for next year’s workplace campaign.
• Recruiting colleagues to volunteer.

HOW UNITED WAY NCA HELPS YOU WITH YOUR CAMPAIGN:

Your United Way NCA Representative is always ready to assist you with planning and managing your workplace campaign. He or she has helped many other ECCs in our area put together programs that are successful year after year. Whenever you need assistance, just reach out to your representative via phone or email. You’ll also find plenty of good advice online at UnitedWayNCA.org, where you can:

• Find upcoming volunteer opportunities.
• Read stories about United Way NCA’s work.
• Download campaign materials including brochures, pledge cards, sample campaign letters, posters, PowerPoint presentations and more.

START BUILDING YOUR CAMPAIGN TEAM

A SUCCESSFUL CAMPAIGN BEGINS WITH A GREAT TEAM. RECRUIT PEOPLE WHO BELIEVE IN UNITED WAY NCA AND WHO WILL INSPIRE OTHERS TO GET EXCITED ABOUT THE CAMPAIGN. MAKE SURE TO INCLUDE EMPLOYEES FROM ALL AREAS AND LEVELS OF YOUR ORGANIZATION.
TEN CAMPAIGN TIPS FOR SUCCESSFUL ENGAGEMENT

1. SECURE TOP-LEVEL MANAGEMENT SUPPORT
Support from top management can make your job easier and your campaign more successful. Find out what resources are available and strive for the following commitments:

- Management will allow time for you to coordinate the campaign.
- Your CEO will write a letter endorsing the campaign.
- Management will speak at employee meetings and events.
- Time and budget will be allocated for campaign related activities and incentives.
- Your CEO will appoint a Senior Executive Campaign Chair.
- The company will provide a corporate gift to match employee giving, e.g. dollar-for-dollar.
- A separate meeting for senior management will beheld to get their support and visible leadership.

2. RECRUIT A TEAM
Having others assist you with the campaign will make it fun and much easier for everyone involved. Here are some tips for recruiting your committee:

- Make sure to include representation from all areas and levels of your organization. Assign roles and responsibilities to each team member.
- Include a member of management on your committee to focus on Leadership giving.
- Recruit people who believe in United Way NCA and will help others get excited about the campaign. Strive for a campaign volunteer ratio of 1 for every 10–20 employees.
- Recruit site coordinators from each department as well as remote locations to help implement the strategy.
- Reach out to your United Way NCA Representative. He or she is there to help you every step of the way. Let him or her know your limitations and come up with a plan together to make it easier for you.

3. DEVELOP A CAMPAIGN PLAN
Develop a timeline. The most successful campaigns conclude within two or three weeks after launch. The goal is to distribute and collect pledge cards while the United Way NCA message is still fresh in employees’ minds. Set achievable, measurable goals and track the results.

- Identify the culture of your company and choose strategies that will fit nicely within the workplace environment.
- Review the strengths of past campaigns and establish a challenging campaign goal with your CEO that focuses on growing this year’s effort.
- Look at participation levels in previous campaigns and set a participation goal.
- Make sure you included all of your organization’s locations and accounted for employees working various shifts, as well as part-time employees, retirees and labor unions.
- Orchestrate fundraisers to make a team-contribution to a United Way NCA Community Impact Fund. Schedule these fundraisers throughout the year to keep your organization’s community engagement goal front and center.
- Most workplace campaigns occur between early September and mid-December; however, they can take place any time of the year.

4. ORGANIZE A LEADERSHIP GIVING PROGRAM
Leadership givers demonstrate their involvement and commitment with an annual gift of $1,000 or more.

- Have a member of management recruit others for this program.
- See page 13 for more information on utilizing Leadership giving in your campaign.
- Begin your Leadership campaign before the general campaign. Your Leadership donors' participation and investment will help to inspire others to give.
- Develop your own company Leadership giving levels and internal recognition program.
TEN CAMPAIGN TIPS FOR SUCCESSFUL ENGAGEMENT (Continued)

5 PROMOTE YOUR CAMPAIGN

Educating your colleagues about the value of United Way NCA’s work is the best way to gain their support for the campaign. Your United Way NCA Representative is an excellent source for any materials and assistance you may need.

- Offer employees the opportunity to do a tour at one of our member nonprofit organizations.
- Utilize United Way NCA brochures and posters.
- Use technological resources such as your company’s intranet, e-mail and/or voicemail to pass along information about United Way NCA to all employees.
- Use incentives and other forms of recognition to thank employees for their generosity.
- Incorporate opportunities for employees to volunteer and advocate on a year-round basis.
- Ask employees to provide their email addresses when making their pledges so they can follow their investments and stay involved all year long.

6 KICKOFF YOUR CAMPAIGN

A kickoff rally can help infuse some fun into your company campaign and help employees understand the importance of participation. Be sure to include the following in your kickoff event:

- Use United Way NCA campaign video, e-mails, voice mails and/or letters from the CEO/president to get the word out. Use your company’s intranet to provide information and results
- Guest appearances by a United Way NCA speaker or a representative from a member nonprofit organization and a beneficiary from your community.
- CEO and labor-leadership campaign endorsement.
- Employee testimonial.
- A direct “ask” for employees to make a United Way NCA contribution. Create and distribute a company video starring your colleagues sharing their reasons for Living United in prior campaigns.
- Refreshments.

7 MAKING THE ASK

Your knowledge, enthusiasm and commitment to supporting United Way NCA are key to encouraging employee pledges. Sincerely communicating your commitment to supporting the community through United Way NCA really does make a difference.

- Assign detailed roles and responsibilities that match managers’ and employees’ unique abilities and influence.
- Assign site coordinators for each department and at each remote location to implement

CAMPAIGN BUILDER

Have the CEO and leadership giving chair offer a personal thank you to all leadership donors. You’ll find many more campaign ideas, best practices and success stories at UnitedWayNCA.org
TEN CAMPAIGN TIPS FOR SUCCESSFUL ENGAGEMENT (Continued)

8 BUILD TEAMS THROUGH VOLUNTEERISM
Each year, United Way's network of member nonprofits and other participating organizations design hands-on projects for corporate volunteers. United Way NCA creates customized experiences for groups of any size, on-site or off-site.

• Volunteering can build stronger and more effective teams. They boost employee morale while helping others. Volunteering will help your organization develop leaders.
• United Way NCA has experience in working on custom project with organizations.
• Employees can volunteer at the workplace by conducting supply drives or in the local community by serving meals, preparing taxes or serving as mentors.
• United Way NCA has several ideas for engagement including skills based volunteering, family volunteering, Fun, Fly, Fit.
• Simple ideas can turn into excellent engagement opportunities if you are flexible.

9 WRAPPING UP THE CAMPAIGN
The Campaign Report Envelope (CRE) is completed by the ECC or that person's designee and submitted to United Way NCA as a summary and record of pledges made. Completed pledge forms and checks should be enclosed in the envelope.

• If you’re running an electronic campaign or a hybrid campaign (which includes paper and electronic forms), you only need to submit a CRE for the paper pledges you receive.
• Meet with your United Way NCA Representative and your payroll department early in your campaign planning to determine your payment strategy and schedule.
• Send a notice to your employees when the first payment is made, letting them know their contributions are going out into the community. This is a great opportunity to thank them again for their support!

10 SAY THANK YOU!
Everyone likes to feel appreciated and acknowledged for their contribution. After the campaign has concluded, it is important to thank everyone for their participation and for supporting our community through United Way NCA.

• Conduct a special celebration with food and words of thanks from management. Remember to invite retirees.
• Send a note or e-card letting each donor know how much the community appreciates his or her gift.
MANAGING OBJECTIONS

Potential donors may have questions concerning United Way NCA 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 MANAGING 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.

ANSWER OBJECTIONS WITH FACTS. Say thank you. Regardless of the prospect’s response, always leave with a smile and a thank you.

REMEMBER TO THINK LONG-TERM. Every question provides an opportunity to communicate how United Way NCA is building a stronger community for everyone in the region. 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 Washington, DC. Why should I give?
United Way NCA member nonprofit organizations provide services not only to residents of Washington, DC, but also to people living in surrounding regions. Consider giving to one of United Way NCA’s regional Community Impact Funds to help residents in one of the other regions they serve, including: Alexandria; Arlington; Fairfax-Falls Church; and Loudoun, Montgomery, Prince George’s and Prince William Counties. You can also contribute to any nonprofit organization of your choice located anywhere around the world.

I give directly to XYZ charity/organization. Why should I give to United Way NCA?
Giving to United Way NCA is the most efficient way to give because:

• United Way NCA adds value to your contribution by providing annual eligibility requirements for nonprofits’ budgets and programs, ensuring that your gift is being used effectively.

• United Way NCA’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 NCA to cost-effectively promote and administer a single campaign that raises money for many causes at once.

• While you may give to other worthy causes as well, view your United Way NCA gift as a “gift to the community” because it supports a network of member nonprofit organizations with wide-reaching impact throughout the whole community.

• When you contribute to United Way NCA directly, you are investing in targeted solutions and programs within our community. You can also choose to contribute to United Way NCA’s Community Impact Fund, which focuses on making a significant impact in the areas of education, financial stability and health.
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 or are no longer working, please contact United Way NCA’s Accountability Department at (202) 488-2000. At that time, you can decide whether you are able to fulfill your original pledge or adjust it. If you have switched jobs and your current employer runs a United Way NCA campaign, it is possible to set up a payroll contribution through the new employer.

My spouse gives for both of us, why should I give to United Way NCA?

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 NCA effort.

I’m never going to use these services, so why should I give?

One in three people in the greater Washington area benefits from the services provided by United Way NCA-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 NCA member nonprofit organizations such as the American Diabetes Association, Martha’s Table and Mentors, Inc. 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 a difference.

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

Every United Way is local and autonomous, including United Way NCA. When you give where you live, you support United Way NCA’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, financial stability and health. United Way NCA annually vets each of its member nonprofit organizations on a variety of criteria. Visit UnitedWayNCA.org to review a complete list of the eligibility guidelines.

- United Way NCA employs a world-class financial reportingsystem. Independent audits have commended United WayNCA with highly favorable reviews and unqualified opinions.
- Internal financial checks and balances were created to ensure United Way NCA’s stability and accountability.

ARRANGE FOR A UNITED WAY NCA MEMBER NONPROFIT PRESENTATION

The best way to win employees’ interest and support is to let them see and hear for themselves the impact that their donations to United Way NCA can have. Contact your United Way NCA Representative to arrange for a special guest speaker for your kickoff event.

ARRANGE FOR A UNITED WAY NCA MEMBER NONPROFIT PRESENTATION

- Learn about our impact areas, programs and initiatives
- Learn about our member nonprofit organizations
- Find out about volunteer opportunities
- Learn about our Leadership giving groups
- See a list of our board of directors
- View our financial information
- Join us on Facebook at Facebook.com/
- UnitedWayNCA and on Twitter @UWNCA
LEADERSHIP GIVING

The Leadership giving program is designed to encourage and recognize individuals in our community who make gifts of $1,000 or more to the community through the annual United Way NCA Campaign. Conducting a Leadership giving campaign is one of the best ways to increase the success and impact of your company’s overall campaign. As an integral part of your employee campaign, Leadership giving allows your employees to make a meaningful difference and sets your organization apart as a leader in our community.

Steps For A Successful Leadership Giving Campaign

GAIN CEO AND LEADERSHIP SUPPORT

- Ask the CEO to appoint a well-respected member of senior management who is already giving at the Leadership level to lead your company’s Leadership solicitation.
- Engage your CEO and senior management in leading, implementing and executing Leadership giving.
- Meet with your management staff to help them understand the importance of Leadership giving.

ASK

- Invite a local nonprofit beneficiary to attend the event and share a personal story.
- The CEO should be present at the Leadership kickoff and ask colleagues for their personal contributions.
- Promote Leadership giving throughout your employee campaign.

THANK ALL LEADERSHIP GIVERS

- The CEO and Leadership Giving Chair should send a personal thank you to all Leadership donors.
- All Leadership donors should be visibly recognized in order to encourage others.

DEVELOP YOUR STRATEGY

- Develop a plan for meeting with potential donors. Determine what would be most appropriate for your organization: CEO breakfast, luncheon or end of the day reception.
- Make one-on-one requests of current and prospective Leadership donors.
- Secure Leadership gifts early by holding a Leadership drive prior to the company-wide campaign kickoff. This allows company leaders to set the pace for the campaign and lead by example.
- Set goals for Leadership giving: increase awareness, increase number of Leadership donors and increase per capita giving.
KICKOFF RALLY

DÉCOR FOR YOUR RALLY

• United Way NCA posters
• LIVE UNITED balloons
• United Way NCA podium mount
• Large screen with projected United Way NCA pictures

THE FLOW

• Show the United Way NCA Workplace Campaign video
• Tell “How I LIVE UNITED” stories
• Welcome participants
• Talk about fighting for the health, education and financial stability of every person in every community. Invite your United Way NCA Representative.
• Promote volunteerism
• Give a Community Impact Report that addresses United Way NCA’s work in the areas of education, financial stability and health
• CEO endorsement
• Labor-leadership campaign endorsement (if applicable)
• United Way NCA member nonprofit presentation
• Employee testimonial
• Ask loyal contributors to stand
• Thank Leadership givers
• Make a direct ask to encourage employees to contribute to United Way NCA. Provide pledge forms or if your company is hosting an electronic campaign, have computers at the rally so people can sign up right there. Consider having a special incentive for those who do.
• Your United Way NCA Representative can recommend speakers for your rally based on the interests of your workforce. For planning purposes, please allow two weeks to process your speaker request. Since most speakers are doing numerous rallies throughout the campaign, it is not always possible to get the speaker you request. Please consider several options in case your first choice is unavailable.
• Provide refreshments

THE FLOW

“For this year’s campaign, we came up with several unique fundraising events that were new, fun and exciting. For example, just before Halloween, we held a pumpkin decorating contest within our office. Several participants either carved or painted their pumpkins, and the rest of the employees participated by putting their donations in a jar next to their favorite pumpkins. Like our regular bake sales and raffles, this fundraising event was a huge success!”

- ANGIE PON, Client Support Analyst,
3M Health Information Systems

START BUILDING YOUR CAMPAIGN TEAM

A SUCCESSFUL CAMPAIGN BEGINS WITH A GREAT TEAM. RECRUIT PEOPLE WHO BELIEVE IN UNITED WAY NCA AND WHO WILL INSPIRE OTHERS TO GET EXCITED ABOUT THE CAMPAIGN. MAKE SURE TO INCLUDE EMPLOYEES FROM ALL AREAS AND LEVELS OF YOUR ORGANIZATION.
CAMPAIGN BUILDER

United Way Leadership Giving Initiatives

As an Impact Coordinator, your primary role is to plan, coordinate and implement an effective United Way of the National Capital Area (United Way NCA) workplace campaign.

We rely on you to impress upon your colleagues the significant challenges that underserved populations in our region face every day and to inspire your co-workers to make a commitment to Live United.

EMERGING LEADERS SOCIETY:

United Way’s Young Philanthropists is a group of passionate, community-focused, up-and-coming professionals in their twenties or thirties who want to connect with like-minded peers, serve their community, and develop as leaders for change. Young Philanthropists achieve these goals through participation in annual United Way volunteer events, engaging in the issues faced by others in our community, by giving personally, and by sharing the United Way mission with peers.

BENEFITS

• Invitations to Emerging Leaders Society networking receptions, social events, United Way events, and community building activities.

• The opportunity to make an impact by taking part in meaningful activities including volunteer projects, mentoring, and community service projects.

• Gaining firsthand knowledge of the unique non-profit landscape in and around Washington, DC through discussions with leaders and visits to United Way NCA service locations.

• Recognition in United Way NCA Annual Report and website

• The opportunity to enhance leadership skills through the Board Leadership Development Program. A select program designed to build non-profit board skills coupled with an internship opportunity with a Board of Directors.

To learn how you can get involved, contact Aaron Bobik (abobik@uwnca.org), Manager of Philanthropic Engagement.

WOMEN UNITED:

United Way’s Women United program recognizes women who are leading the way in making an impact on our community. Women United is a network of philanthropists who recognize and encourage exceptionality in their ability to bring about positive community change. They achieve these goals through designing and leading an annual, signature volunteer event, giving personally, and leveraging their personal and professional networks for the betterment of those in need in our community.

BENEFITS

• Special invitations to United Way NCA events and receptions.

• Gaining firsthand experience with issues facing our community through discussions and visits to United Way NCA program sites.

• The opportunity to work with like-minded philanthropists to build an annual day of service event for our community.

• Special updates regarding the impact your philanthropy is having through United Way NCA.

• The opportunity to network with United Way NCA leadership as well as other women leaders from the various sectors in our community: philanthropy, business, law, education, and public service.

• Special recognition highlighting your role as a community leader at United Way NCA events, website, Annual Report, and other publications.

• A Women United lapel pin

To learn how you can get involved, contact Stephen Saunders (ssaunders@uwnca.org), Director of Philanthropic Engagement.
TOCQUEVILLE SOCIETY:

Since 1987, the United Way Tocqueville Society has recognized leaders who believe, deeply, in our community and in Living United. Through their generosity they are committing to positive change now and in the future by enabling United Way NCA to build capacity in our member nonprofits and with our direct services programming in health, education, and personal finances. The Tocqueville Society is comprised of leading philanthropists who understand the value of a major investment in our community, especially when directed and leveraged. Tocqueville Society philanthropists achieve the goal through leading an annual, signature volunteer event that engages our community, by giving personally, and by sharing the opportunity to invest among peers and colleagues.

BENEFITS

• Special, VIP invitations to United Way NCA events and receptions.
• Invitations to Tocqueville Society events.
• Opportunity to network with other community oriented philanthropists and United Way NCA Board and Executive leadership.
• Opportunity to lead the effort to build an annual day of service event for our community.
• Personal updates regarding the impact your philanthropy is having through United Way NCA.

• Gaining firsthand experience with issues facing our community through discussions and visits to United Way NCA program sites.
• Special recognition highlighting your role as a community leader at United Way NCA events, website, Annual Report, and other publications.
• Tocqueville Society lapel pin

To learn how you can get involved, contact Stephen Saunders (ssanders@uwnca.org), Director of Philanthropic Engagement.

PROMOTE YOUR CAMPAIGN

Create a big buzz for a small price. You don’t have to spend a lot of money to get the word out. Here are some simple and easy-to-execute ideas to get you started.

BENEFITS

Campaign staff, volunteers and other supporters love to wear the LIVE UNITED t-shirt, but don’t stop there! Ask the CEO and senior managers to wear it as well. You can even get creative and dress a statue or mannequin in a t-shirt and put it on display.

WINDOW DRESSING

Put together a window display of LIVE UNITED signs, posters, photos, stickers and other items for an office display case.

CONDUCT A CONTEST

Encourage a little friendly competition. Who can write the best LIVE UNITED essay? Who rocks the mic at the LIVE UNITED poetry slam? Who has the best LIVE UNITED story?

WHAT’S YOUR SIGN?

Display LIVE UNITED or use your company name (for example, ABC COMPANY LIVES UNITED) on electronic signboards, marquees, billboards and other high visibility spots.

CHALK IT UP

Use chalk to write “LIVE UNITED” in front of the office, in the parking lot, or on another paved surface.

JEANS FOR A CAUSE

Piggyback on the almost universal popularity of a dress-down day at work. Employees can wear jeans to work if they donate $5 and wear a LIVE UNITED sticker. Put a glass jar for the money and a pile of stickers on the receptionist’s desk or in another central location.

THANK YOU-GRAM

Send a LIVE UNITED thank you to any and all people who helped to put these ideas into practice or for anything else they did to make the campaign a success.

MAKE A MOVIE

Create a video, starring your staff, on the subject of Living United. Employees can talk about why they decided to donate, as well as the satisfaction that they got from doing it, while encouraging others to get involved. This is a great way to personalize the campaign to your company. Get more campaign ideas, best practices and success stories at UnitedWayNCA.org.
PRIZES AND OTHER INCENTIVES

Many companies have demonstrated that it doesn’t take a lot of money to offer great prizes to reward employees for participating in campaign events. Not every prize has to be huge — people just like to be recognized.

HERE ARE SOME SUGGESTIONS

- Pizza party
- Paid time off
- Casual Fridays
- Call in “Well” Day
- Free hotel stay
- “Sleep in late” coupons
- Prime parking spaces
- Open soda and candy machines
- Free oil change
- Shares of company stock
- Beauty or barber shop coupons

- Gift certificates
- Coffee served at donor’s desk each morning
- Cocktail party or dinner at the CEO’s home
- “Flee @ 3” coupons
- Corporate logo clothing
- Use of company car
- Airline tickets
- Lottery tickets
- Gift cards
- Golf lessons
- Tickets to plays, sporting events and concerts
EMPLOYEE PLEDGES—MAKING THE ASK

People give to United Way NCA because they believe in what we do. Your knowledge, enthusiasm and commitment to supporting United Way NCA are key to encouraging employee pledges. Sincerely communicating your commitment to supporting the community through United Way NCA really does make a difference.

In order to run a successful campaign we recommend the following steps:

BE PREPARED

If possible, team members should be assigned to speak with individual employees about a potential contribution. Before beginning, each team member should prepare himself or herself by:

• Showing commitment to United Way NCA by increasing his or her own pledge before asking co-workers to pledge themselves. It is much easier to ask others to do what you have already done.
• Watching the campaign video to hear testimonials from people who have been helped by United Way NCA.
• Learning more about United Way NCA’s mission, vision and our impact in the community.

FIVE STEPS TO A SUCCESSFUL ASK

Leaving pledge cards in employees’ mailboxes does not constitute an effective “ask.” Here are steps to take when asking for employee pledges.

1. GET THE DONOR’S UNDIVIDED ATTENTION

   • Consider catching the donor on a break, at a staff meeting or at an organized staff event and ask him or her to consider participating in the campaign.

2. EXPLAIN THE PURPOSE OF UNITED WAY NCA AND WHY YOU SUPPORT OUR MISSION.

   • Bring United Way NCA materials and be prepared to explain them.
   • Share a personal story and/or provide United Way NCA facts and statistics.

3. ASK FOR A PLEDGE INCREASE.

   • With new givers, ask for a first-time gift.
   • Consider asking for a specific increase such as $5 more per week or pay period.

4. ADDRESS CONCERNS AND QUESTIONS.

   • Know your materials, answer questions honestly — never guess. If you don’t know the answer to a question, let the donor know you will find out and then follow up with your United Way NCA Representative.
   • Recognize that some donors have real concerns; people have a right to feel good about their gift. If any of your colleagues would like to contact your United Way NCA Representative directly with questions, encourage them to do so. Your representative is here to help.

5. SAY THANK YOU.

   • Regardless of what the donor decides, thank him or her for the time.
   • People like to know their gift is appreciated.

UNITED WAY DESIGNATED DONATION

A designated donation will go to help drive community initiatives and provide the backbone for our continuing support of programs and advocacy throughout the region. It may also be directed to a United Way NCA Community Impact Fund, where it might be used to address the most serious issues affecting the community, as well as to other important community building initiatives.
BUILD STRONG TEAMS THROUGH WORKPLACE VOLUNTEERISM

Each year, United Way’s network of member nonprofits and other participating organizations design hands-on projects for corporate volunteers. By participating, volunteers gain a deeper understanding of our region’s social service community and the work that United Way NCA and local nonprofits do every day of the year.

GROUP BENEFITS
- Build stronger and more effective teams
- Boost employee morale and commitment
- Help others through hands-on experience
- Develop future leaders with new areas of expertise
- Employees see how agencies use campaign dollars in the community

WHY VOLUNTEER WITH UNITED WAY NCA?
- We are experienced in developing custom projects
- We are a one-stop shop connecting your team to what matters to you
- We make it easy and fun to volunteer

VOLUNTEER IN YOUR LOCAL COMMUNITY
- Serve meals, tutor children, prepare taxes, lead workshops, review grants, offer homework help, or serve as a mentor
- Clean, organize, care for gardens and beautify facilities for United Way community partners
- Play board games with older adults, be a classroom assistant, conduct mock interviews, help care for a garden or sort, pack and distribute food

VOLUNTEER AT YOUR WORKPLACE OR FACILITY
- Coordinate a supply collection drive for requested items (school supplies, hygiene, food, clothes, toys) for children, men, women, veterans and people experiencing homelessness
- Host a kit packing party
- Organize a sandwich-making, trial-mix or snack pack assembly line and include encouraging notes or sort, pack and distribute food

IDEAS FOR ENGAGEMENT
- Special Volunteer Days - MLK Day of Service, National Volunteer Week, Earth Day, United Way Day of Action, Day of Remembrance, Veteran’s Day
- Signature Projects - Do More 24, Project Homeless Connect, Volunteer Income Tax Assistance (VITA)

IDEAS FOR ENGAGEMENT (cont.):
- Fun, Fly, Fit
- Ongoing Opportunities
- Hands-on volunteering
- Skills Based Volunteering (financial, legal, marketing, graphic design, medical, etc.)
- Family volunteering (food pantry, gardening, meal packing, smoke education/awareness)

WHAT WE’VE LEARNED
- You have what you need – START THERE
- Simple ideas can turn into greater engagement opportunities
- The experience of the brand is important
- Be flexible (PLAN – EXECUTE – EVALUATE – IMPROVE – EXECUTE AGAIN)
- Companies have employees with different desires – meet the needs
- Think beyond campaign; think year-long engagement
- Complete a project based on the specific needs of the agency and interests of the company

WHAT IS IMPORTANT TO LEADERS
- Employees connect to company’s signature volunteer event/program
- Employees choose the causes
- Employees connect with peers around causes
- Support for employees
- Year-round giving
- Measuring ROI

GETTING STARTED – BLUEPRINT FOR SUCCESS
- Get management support
- Meet face to face with United Way NCA representative and internal planning team
- Include others in the planning
- Create a plan together
- Devise communications strategies
- Build in opportunities for reflection and learning
- Thank and recognize employee volunteers
- Celebrate success
United Way NCA creates customized experiences for groups of any size, on-site or off-site to make a meaningful difference in the national capital area.

**HOW TO SIGN UP**

**Step 1  SUBMIT YOUR REQUEST**

- Check out our online calendar of available opportunities at http://www.unitedwaynca.org/page/s/upcoming-volunteer-opportunities
- To organize a custom activity for your team, please email Torrance Hucks, Volunteer Manager at (thucks@uwnca.org)
- Our team handles each request with quality customer service
- Be sure to submit your request a minimum of 4 – 6 weeks before your desired project date(s).
- Please allow at least 8 weeks of planning for multiple projects or large-scale events.

**Step 2  CONFIRM**

Once our Volunteer Team matches you with an activity, we will coordinate with you and the appropriate community-based partner(s) to develop and confirm the project – we are your liaison throughout the experience to ensure your volunteer day is well organized.

**Step 3  RECRUIT**

Assign a company team leader to communicate volunteer assignments, logistics, details about the projects clothing recommendations, directions, etc. to employees. Be sure to recruit the number of volunteers needed for your particular projects.

**Step 4  COMPLETE YOUR PROJECT**

Have fun with your colleagues while giving back in the national capital area. A debrief will be scheduled to share feedback.

**NEWS YOU NEED TO KNOW**

**Join Us** - UWNCA invites you to join our Volunteerism Program and become part of our strategic solution.

**BUILD YOUR TEAM**

**ELEVATE YOUR CORPORATE COMMUNITY**

**ENHANCE EMPLOYEE MORALE**

**Group Data**: tell us about you and/or your team

**Project Data**: budget, expected number of volunteers, minimum volunteer age, focus area, company address/location, maximum distance (in miles) from company to venue, company location

**Event details**:  
Date selection – 1st Choice  
Date selection – 2nd Choice  
Desired Start Time:  
Desired End Time:  

**Who is the primary event lead?**  
Name (First and Last):  
Company Name:  
Email address:  
Phone:

United Way NCA creates customized experiences for groups of any size, on-site or off-site to make a meaningful difference in the national capital area.
### CAMPAIGN PLANNING WORKSHEET

<table>
<thead>
<tr>
<th><strong>PHASE ONE</strong> (at least six weeks before kickoff)</th>
<th>✓</th>
<th><strong>NOTES FOR FOLLOW UP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet with United Way NCA Representative</td>
<td></td>
<td></td>
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<tr>
<td>Obtain CEO endorsement and support</td>
<td></td>
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<tr>
<td>Recruit campaign team</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Get sales tax license for auction (as applicable)</td>
<td></td>
<td></td>
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<tr>
<td>Train team/assign tasks</td>
<td></td>
<td></td>
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<tr>
<td>Develop campaign plan:</td>
<td></td>
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<tr>
<td>Goal</td>
<td></td>
<td></td>
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<tr>
<td>Timetable</td>
<td></td>
<td></td>
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<tr>
<td>Publicity/Promotions</td>
<td></td>
<td></td>
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<tr>
<td>Incentives</td>
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</tbody>
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<thead>
<tr>
<th><strong>PHASE TWO</strong> (at least four weeks before kickoff)</th>
<th>✓</th>
<th><strong>NOTES FOR FOLLOW UP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop a Leadership Giving campaign</td>
<td></td>
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<tr>
<td>Secure management’s approval of plan</td>
<td></td>
<td></td>
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<tr>
<td>Plan and market the campaign kickoff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule/announce campaign kickoff</td>
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<td></td>
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<tr>
<td>Arrange member nonprofit speakers and tours</td>
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<tr>
<td>Send letter from top executive to all employees</td>
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</tbody>
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<thead>
<tr>
<th><strong>PHASE THREE</strong> (in the final week before kickoff)</th>
<th>✓</th>
<th><strong>NOTES FOR FOLLOW UP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Send reminder about kickoff meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrange for announcements at company meetings</td>
<td></td>
<td></td>
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<tr>
<td>Re-check food and beverage orders for expected turnout</td>
<td></td>
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<table>
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<tr>
<th><strong>KICKOFF</strong></th>
<th></th>
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<thead>
<tr>
<th><strong>PHASE FOUR</strong> (one week after kickoff)</th>
<th>✓</th>
<th><strong>NOTES FOR FOLLOW UP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Report progress to United Way NCA Representative</td>
<td></td>
<td></td>
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<tr>
<td>Send reminders to employees</td>
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</tbody>
</table>

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<thead>
<tr>
<th><strong>PHASE FIVE</strong> (three weeks after kickoff)</th>
<th>✓</th>
<th><strong>NOTES FOR FOLLOW UP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Host a thank you event</td>
<td></td>
<td></td>
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<tr>
<td>Submit final results to United Way NCA Representative</td>
<td></td>
<td></td>
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</tbody>
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<thead>
<tr>
<th><strong>PHASE SIX</strong> (anytime throughout the year)</th>
<th>✓</th>
<th><strong>NOTES FOR FOLLOW UP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend United Way NCA events</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participate in Day of Caring volunteer opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer new hires the chance to give through payroll contribution</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Campaign Report Envelope (CRE) is completed by the Impact Coordinator or that person’s designee and submitted to United Way NCA as a summary and record of pledges made. Completed pledge forms and checks should be enclosed in the envelope. If you’re running an electronic campaign or a hybrid campaign (which includes paper and electronic forms), you only need to submit a CRE for the paper pledges you receive.

Interim, partial reports enable United Way NCA to help you keep records and track progress.

### HOW TO COMPLETE THE CRE

The Campaign Report Envelope (CRE) is completed by the Impact Coordinator or that person’s designee and submitted to United Way NCA as a summary and record of pledges made. Completed pledge forms and checks should be enclosed in the envelope. If you’re running an electronic campaign or a hybrid campaign (which includes paper and electronic forms), you only need to submit a CRE for the paper pledges you receive.

Interim, partial reports enable United Way NCA to help you keep records and track progress.

### ACCOUNT NUMBER:

**COMPANY / ORGANIZATION:**

**ADDRESS:**

**# OF GIVERS**

**PLEDGE/PAYMENTS $**

**ENCLOSED PAYMENTS $**

### PAYROLL CONTRIBUTION

Checks, credit card charges, direct bill. Please PAPER CLIP checks to pledge cards.

### CORPORATE GIFT

Make checks payable to United Way. Please enclose supporting documentation.

### GIFT IN KIND

Make checks payable to United Way.

### SPECIAL EVENTS

Including fundraisers or other campaign related activities that generate gifts other than individual pledges or donations.

### TOTALS

Tally total number of donors giving by check, credit card or direct bill.

Please record any enclosed payments in each category in this column.

Please provide contact information. The preparer should sign and date the CRE.

### TALLY NUMBER OF DONORS GIVING BY PAYROLL CONTRIBUTION.

Please indicate whether this report is partial (you expect more pledges to follow); final or an additional report, such as funds raised in a special event.

### SPECIAL EVENTS

Including fundraisers or other campaign related activities that generate gifts other than individual pledges or donations.

### TOTAL NUMBER OF EMPLOYEES WHETHER THEY PARTICIPATED OR NOT.

Please provide total dollar amount of pledges and payments in this column for each category (by row). The total of this column should equal your total campaign attachment.

### IMPORTANT INSTRUCTIONS

ENCLOSE IN THIS ENVELOPE: Fully paid contributions, check and credit card requests.

DO NOT ENCLOSE IN THIS ENVELOPE: Cash in any form (paper or coins).

**NOTE:** Interim, partial reports enable United Way Campaign to help you keep records and track campaign progress.

### FOR UNITED WAY USE ONLY

Please make a copy for your records.
PUT PLEDGES INTO ACTION: YOUR PAYMENT SCHEDULE

Following are some best practices for getting your contributions into the community in a timely and efficient manner:

- Meet with your United Way NCA Representative and your payroll department early in your campaign planning to determine your payment strategy and schedule.

- Be sure to remit any paid-in-full donations with your pledge forms in your Campaign Report Envelope (CRE). Any cash collected should be remitted by check. These should be sent to:

  United Way of the National Capital Area
  Campaign Accountability
  1577 Spring Hill Road, Suite 420
  Vienna, Virginia 22182

- Continuing Payroll Contribution payments should be remitted on a monthly basis beginning within 45 days of the close of your campaign (smaller campaigns could consider a quarterly schedule). These ongoing payments should be remitted to:

  United Way of the National Capital Area
  Accounts Receivable
  1577 Spring Hill Road, Suite 420
  Vienna, Virginia 22182

- The most common payroll contribution period usually runs from January 1 through December 31. Some companies use their fiscal year as their schedule for payroll contribution. United Way NCA does not set your payroll schedule; it is a company decision.

- United Way NCA remits all employee donations on a quarterly basis, based upon when funds are received from your company. Initial remittances to non-member nonprofits may be somewhat delayed to allow for a review of the designated organization by United Way NCA. For other questions, please contact your United Way Representative.

- Send a notice to your employees when the first payment is made, letting them know their contributions are going out into the community. This is a great opportunity to thank them again for their support!

For questions regarding Pledge Processing or Accounts Payable, please call (202) 488-2000.

WHEN YOUR CAMPAIGN IS COMPLETED

A. Collect all of the pledge forms. You can send out a reminder e-mail, designate solicitors on your team to ask every person individually to turn in a form or create a special incentive for pledge forms turned in by a certain date.

B. Count the number of donors and the amount raised in each of the following categories: check, credit card, direct bill and payroll contribution.

C. Send in the campaign report envelope (CRE). Mail the CRE to our main office for processing.

  United Way of the National Capital Area
  Campaign Accountability
  1577 Spring Hill Road, Suite 420
  Vienna, VA 22182

D. Call your United Way NCA Representative to share results of your campaign efforts. Keep in mind that once your CRE is received, it goes through an auditing process. United Way NCA staff may follow up with questions. If people turn in their pledge forms after you’ve sent your envelope, please send additional pledge forms to the United Way NCA office at the above address. Contact your United Way NCA Representative if you have any questions.
SAY THANK YOU

After the conclusion of the campaign, it is very important to thank all of the employees who helped make your campaign a success. People want to feel appreciated when they have done something positive. Here are some suggested ways to thank your participating co-workers.

**LIVE UNITED BALLOONS OR FLOWERS**

 Surprise each contributor on the last day of the campaign. Place a balloon or flower at each donor’s desk.

**LIVE UNITED THANK YOU SACK LUNCH**

 Order LIVE UNITED sack lunches for every contributor. Include a thank you note from your CEO or include thank you drawings or letters from children served by a United Way NCA member nonprofit organization.

**UNITED WAY NCA MERCHANDISE**

 Give t-shirts, pens or note pads with the United Way NCA logo on them. Create your own or order items from United Way NCA’s online store at UnitedWayNCA.org.

**SCOOPING UP SUCCESS**

 An ice cream social is a great way to celebrate a successful campaign. Have the management team scoop up the ice cream and personally thank each employee.

**WAFFLE/PANCAKE BREAKFAST**

 Have management serve up breakfast for everyone who contributed.

**BARBECUE OR PIZZA PARTY**

 Invite employees to a company-wide lunch. Have executives cook or serve.

**CANDY GRAM**

 Distribute candy bars to each participant with a thank you message attached.

**CHIP IN FOR UNITED WAY**

 Place chocolate chip cookies on every contributor’s desk with a note thanking each one for chipping in for United Way NCA.

**KEEP IN TOUCH**

 Please be sure to let your coworkers know how to stay engaged with United Way NCA’s work throughout the year. They can sign up for regular email updates at UnitedWayNCA.org, where they will learn about year-round volunteer opportunities and community events. They will also learn more about Do More 24, the annual giving day United Way NCA hosts on the first Thursday in June, and Project Homeless Connect which usually occurs in the fall.
Thank You for making an IMPACT.

Want more helpful resources?
Visit UnitedWayNCA.org/workplace-campaigns

Join the Conversation
@UWNCA
UnitedWayNCA

1101 15th Street, NW, Suite 1000
Washington, DC 20005