

2021-2022 WORKPLACE IMPACT COORDINATOR HANDBOOK



United Way
of the National Capital Area

Give Directly to United Way NCA #8000

CFC Code 31408

UnitedWayNCA.org





HELP BUILD A BETTER COMMUNITY.

Congratulations! You have been selected for an important role.

Workplace Impact Coordinator.

This year more than ever, by agreeing to lead your company's workplace campaign, you join a passionate group creating lasting change in our region. Countless children and families are experiencing unprecedented challenges. By volunteering your time and talent, you play a vital role in raising awareness about how each person's commitment to contributing to nonprofits like United Way NCA provide a safety net to our community. Together with passionate supporters like you, we are leading the charge to improve **the health, education and economic opportunity of all National Capital Area community members, making bold strides to create a more equitable future. When none are ignored, all will thrive.**

We hope this guide will provide you with the necessary resources to run your employee giving campaign. Please reach out to your United Way NCA Relationship Manager, who can provide additional support and guidance throughout your campaign, **at any time.**

ROLE OF THE IMPACT COORDINATOR

The campaign Impact Coordinator plays an important role in creating impact internally and externally. With many people working remotely, it is even more important to connect people with the community and the causes that create the most impact. The Impact Coordinator enables co-workers to help create a stronger community by planning, organizing and coordinating a successful United Way NCA campaign within your company. Your United Way NCA contact can help you throughout the process.

YOUR RESPONSIBILITIES INCLUDE:

- ▶ Develop an effective campaign plan including dates & goals
- ▶ Recruit a team of volunteers to help you
- ▶ Coordinate your company's kickoff and recognition events
- ▶ Encourage leadership giving
- ▶ Educate your coworkers about United Way NCA
- ▶ Invite everyone to give
- ▶ Make your company campaign fun!

Prior to the campaign:

- ▶ Check out our campaign toolkit for ideas and resources at United Way NCA's Campaign Toolkit
- ▶ Meeting with your United Way NCA campaign team to review prior years' giving and develop a campaign strategy
- ▶ Establish a campaign goal (i.e. participation increase and/or gift amount)
- ▶ Establish campaign timetable
- ▶ Publicize the campaign to your employees—social media, internal newsletters, email blasts with video content, etc.

During the campaign:

- ▶ Kick off your campaign—We can help you set up a kick-off activity to get your team excited and involved.
- ▶ Follow up with employees who are unable to attend
- ▶ Record your kick off and send photos to United Way NCA for **potential** placement on our website and social media

After the campaign:

- ▶ Tabulate results and submit the billable Campaign Report Envelope and required forms to your United Way NCA representative (send copy of payroll deduction forms to your payroll department)
- ▶ Thank your committee and employees who participated
- ▶ Fill out a survey from United Way NCA for you to evaluate your company's campaign

We thank you for your commitment and for a job well done!

10 CAMPAIGN TIPS FOR SUCCESSFUL ENGAGEMENT

1 SECURE TOP-LEVEL LEADERSHIP SUPPORT

Support from top management can make your job easier and your campaign more successful.

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.

2 RECRUIT A TEAM

Having others assist you with the campaign will make it fun and much easier for everyone involved.

8 BUILD TEAMS THROUGH VOLUNTEERISM

Each year, United Way NCA's network of member nonprofits and other participating organizations design hands-on projects for corporate volunteers, such as Stuff the Bus, writing notes of encouragement to community members in need, kit-packing events and much more.

3 DEVELOP A CAMPAIGN PLAN

Develop a timeline. The most successful campaigns conclude within two or three weeks after launch. Set achievable, measurable goals and track the results.

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.

4 ORGANIZE A LEADERSHIP GIVING PROGRAM

Leadership givers demonstrate their involvement and commitment with an annual gift of \$1,000 or more.

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.

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.

6 KICKOFF YOUR CAMPAIGN

A kickoff rally can help infuse some fun into your company campaign and help employees understand the importance of participation.

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 to 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.

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.

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.





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.

TOCQUEVILLE SOCIETY: \$10,000

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 **economic opportunity**. 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 **and on the website**
- ▶ Annual Report and other publications
- ▶ Tocqueville Society lapel pin

WOMEN UNITED: \$2,500

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

YOUNG PHILANTHROPISTS: \$1,000

United Way's Young Philanthropists is a group of passionate, community-focused, up-and-coming professionals in their **20s** or **30s** 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 **NCA** mission with peers.

BENEFITS

- ▶ Invitations to Emerging Leader Society networking receptions, social events, United Way **NCA** 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 nonprofit 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 nonprofit board skills coupled with an internship opportunity with a Board of Directors **member**

To learn how you can get involved, contact philanthropy@uwnca.org

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.

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, all team members should prepare themselves 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 them 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.

Thank you for making an IMPACT.

For more information contact:

Lavette S. Sims

lsimscampaign@uwnca.org | 202-488-2113

Want more helpful resources?

Visit UnitedWayNCA.org/wpctoolkit

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

