

# 2023-2024 WORKPLACE IMPACT COORDINATOR HANDBOOK



**CFC Code 31408**

**Give Directly to United Way NCA #8000**

[UnitedWayNCA.org](https://UnitedWayNCA.org)



United Way  
of the National Capital Area

A woman with long brown hair, wearing a white t-shirt with "WE UNITED" on it, is sitting on a blue patterned rug in a classroom. She is smiling and looking down at a small drum in front of her. Several young children are also sitting on the rug, playing colorful drums. The background shows a classroom setting with red chairs and educational posters on the wall.

# HELP BUILD A BETTER COMMUNITY.

**Congratulations! You have been selected for an important role.**

## **Workplace Impact Coordinator.**

Your leadership is needed. By agreeing to lead your company's workplace campaign, you join a passionate group creating lasting change in our region. Countless children, veterans 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 of the National Capital Area (NCA) provide a safety net to our community. Especially the ALICE (Asset Limited, Income Constrained, Employed) population. ALICE represents the nearly 500,000 households that earn more than the Federal Poverty Level but less than the basic cost of living for the county/state in which they live. This translates to an estimated 1.3 million adults and children living in the region who cannot meet the minimum cost of household basics.

Together with passionate supporters like you, we are leading the charge to improve health, education and economic opportunity – the building blocks of opportunity for all residents in the National Capital Area. We hope this guide will provide you with the necessary resources to manage a successful employee giving campaign. Please reach out to your United Way NCA Relationship Manager who can provide additional support and guidance throughout your campaign. We truly believe that when none are ignored, all will thrive.

## **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 coworkers to help create a stronger community by planning, organizing, and coordinating a successful United Way 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.
  - ▶ Meet with your United Way 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.

#### **During the campaign:**

- ▶ Kick off your campaign—We can help you set up a kick-off activity to get your team excited and involved. Since it can be virtual, in-person or hybrid, we can schedule a group lunch and learn (of course it's a BYOL).
- ▶ Follow up with employees who are unable to attend.
- ▶ Record your kick off and send photos to United Way NCA for placement on our website and social media.

#### **After the campaign:**

- ▶ Tabulate results and submit the fillable 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.

# 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.

2

## RECRUIT A TEAM

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

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.

4

## ORGANIZE A LEADERSHIP GIVING PROGRAM

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

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 (virtual or in-person) can help infuse some fun into your company campaign and help employees understand the importance of participation.

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.

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.

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.

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.



# LEADERS UNITED

Leaders United is United Way NCA's leadership giving community for individuals who contribute a designated gift of \$1,000 or more to United Way NCA through the annual United Way Campaign. Conducting a Leaders United 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, Leaders United giving allows your employees to make a meaningful difference and sets your organization apart as a leader in our community.

## Steps For A Successful Leaders United Campaign

### GAIN CEO AND LEADERSHIP SUPPORT

- ▶ Ask the CEO to appoint a well-respected member of senior management who is already giving at the Leaders United level to lead your company's Leaders United solicitation.
- ▶ Engage your CEO and senior management in leading, implementing and executing Leaders United giving.
- ▶ Meet with your management staff to help them understand the importance of Leaders United 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 Leaders United donors.
- ▶ Secure Leaders United gifts early by holding a Leaders United 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 Leaders United giving: increase awareness, increase number of Leaders United 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 Leaders United kickoff and ask colleagues for their personal contributions.
- ▶ Promote Leaders United throughout your employee campaign.

### THANK ALL LEADERS UNITED GIVERS

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



# CAMPAIGN BUILDER

## United Way Leaders United Giving Initiatives

As an Impact Coordinator, your primary role is to plan, coordinate and implement an effective United Way NCA workplace campaign. We rely on you to impress upon your colleagues the significant challenges that the ALICE (Asset Limited, Income Constrained, Employed) , population in our region faces every day and to inspire your co-workers to make a commitment to Live United. [Click here](#) to learn more about United Way NCA's affinity groups and contribution levels.

### YOUNG PHILANTHROPISTS

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

- ▶ Volunteer opportunities through signature events like Project Community Connect, Stuff the Bus and skills-based volunteering. Exclusive networking and social events.
- ▶ Leadership skill building opportunities
- ▶ Membership in Leaders United, United Way NCA's leadership giving community, bringing together like-minded individuals who recognize the challenges facing members of our community and who are committed to investing their resources to make a difference in United Way NCA's pillars of health, education and economic opportunity.

### WOMEN UNITED

Women United members support United Way NCA's mission to mobilize all sectors of the community to work together with one goal in mind – helping children and families live their best lives by reducing disparities and increasing equity across our three pillars of health, education and economic opportunity. We are grounded in our commitment to serving the ALICE population.

#### BENEFITS

- ▶ Networking with women leaders from the various sectors in our community, including philanthropy, business, law, education and public service, as well as the United Way NCA leadership team.
- ▶ Special invitations to Women United events and receptions.
- ▶ Membership in Leaders United, United Way NCA's leadership giving community, bringing together like-minded individuals who recognize the challenges facing members of our community and are committed to investing their resources to make a difference in United Way NCA's pillars of health, education and economic opportunity.
- ▶ Recognition as a community leader at United Way NCA events and our annual report, as well as other publications, as appropriate.

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

- Recognition as a member of Leaders United, United Way NCA's donor recognition community.
- Public recognition in United Way NCA's annual report, newsletter and other print materials.
- Quarterly updates on the impact your philanthropy is having on United Way NCA.
- Volunteer opportunities through signature events, such as Project Community Connect, Stuff the Bus and skills-based volunteering.
- Opportunity to attend United Way NCA events throughout the year.

## 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, marquee, 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 [here](#).

# 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 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 throughout the region.



## 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.

## FIVE STEPS TO A SUCCESSFUL ASK

### 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 prior to a virtual meeting.

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

- ▶ United Way NCA can share 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.
- ▶ Highlight your organization's match. It can help double your donation.

### 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. Your United Way NCA contact can 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.

# Thank you for making an IMPACT.

For more information contact:

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Want more helpful resources?

Visit: [UnitedWayNCA.org/wpctoolkit](https://UnitedWayNCA.org/wpctoolkit)

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