

Campaign Tool-kit



United Way of 1000 Lakes

Welcome

We want to make your job as a United Way campaign coordinator as easy and rewarding as possible.

Within this toolkit, we have provided all of the materials you need to make your company's campaign a success. You are encouraged to work with your United Way staff to determine what pieces will work best for your campaign.

If your company is running a campaign for the first time, please contact Kimberly Brink Smith at 218-999-7570 or by email for help in getting started. For general assistance and for supplies, please contact Hannah Chesness at 218-999-7570 or by email.

Campaign Tool-kit:

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- + Increase Level of Giving — Page 12
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- + Encouraging Leadership Giving — Page 18
- + Campaign Supplies, Materials and Resources — Page 20
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Donor Choice Program — Page 29

The Donor Choice Program allows our donors to fulfill their philanthropic intentions through various giving options.

Making the Ask — Page 31

People give to United Way for many reasons, but the number one reason people do not give is because they weren't asked. On our website downloadable pledge cards, and some additional resources to help you "make the ask."

Events & Incentives — Page 34

What Can Events and Incentives Do For My Campaign?

- Increase enthusiasm and participation
- Increase average gift
- Encourage employees to pledge promptly
- Encourage attendance at campaign meetings
- Special Event Planning

Special events are your opportunity to add a little something extra to the campaign! Not only do they raise extra funding for United Way, but they can be instrumental in team development and great for company spirit. Use this as an opportunity to further educate your employees about United Way and most importantly, have FUN!!

And remember, not every special event has to be elaborate.

- Be creative
- Events should be strategically scheduled throughout the year to be successful and build awareness
- Make it easy for employees to participate
- Secure the support of upper management
- Involve a team in the planning and implementation process
- Have fun!

Remember... when planning special events, please stress that the support of the activities is in addition to the individual campaign pledge.

Guided Reflection — Page 47

This Tool-kit is designed to help spark questions, ideas and conversations that will lead to campaign tweaks, recalibrations and ultimately, improvement.

Planning and Running Your Campaign

Planning and Running Your Campaign

Campaign Basics: Five Strategies for Success

1. AFFIRM TOP MANAGEMENT SUPPORT

Gain approval for recruiting a campaign committee and holding campaign meetings and activities on company time.

Ask for visible support from company leadership during the campaign.

Discuss strategies for corporate support, i.e. corporate gift/match.

Discuss options for engaging senior staff through a focused leadership campaign.

Discuss options for incentives that can be used to encourage participation and increased giving.

2. RECRUIT A CAMPAIGN COMMITTEE

Recruit a diverse team that includes people from different departments and levels (i.e., management, administrative, etc.) within the company.

Invite both new and previously involved committee members to participate.

Set a schedule of committee meetings and distribute to members.

3. DEVELOP A CAMPAIGN PLAN

Invite your United Way representative to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within the company culture.

Determine the means of pledging best suited to your company: pre-printed pledge forms, one-part pledge forms, or online pledging (i-Pledge). Work with your United Way representative to arrange for delivery of all your campaign materials.

Determine the campaign timeline including the pledging timeframe and any presentations and activities that will be taking place.

Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, special events, securing incentives, etc.

Evaluate past results and identify areas where potential for increases may exist- dollars raised, participation, etc. and set a campaign goal that focuses on these areas.

4. IMPLEMENT THE CAMPAIGN PLAN

Promote the Campaign

Place information (posters, flyers, thermometers, etc.) in high traffic areas around your office such as entry ways and break rooms in the weeks leading up to the kickoff so employees have an opportunity to learn about United Way.

Use multiple methods of communication to inform people about the campaign: post information on your intranet, announce the campaign at staff meetings, use payroll stuffers, etc.

Hold the Campaign Kickoff

Start the campaign with your company's leadership team and campaign committee a week prior to the general kickoff.

Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, timeframe, activities and incentives.

Invite a member of the leadership team to the general kickoff meeting(s) to communicate management support of the campaign.

Invite your United Way representative to speak at the meeting(s).

Make the Ask

Make sure that everyone is given the opportunity to make a contribution to the campaign. Use the campaign kickoff, department meetings and one-on-one conversations to encourage participation. The number one reason people say they didn't give is because they weren't asked!

Personally distribute and collect pledge forms. Ask everyone to return their pledge form, even if they choose not to give.

Be prepared to answer questions about United Way. Many commonly asked questions are answered on this website, and your United Way representative can answer any other questions employees may have.

Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference.

Inform employees about opportunities such as United Way's Leadership societies and donor choice program.

Monitor and Report Progress

Send out reminders to encourage people to turn in their pledges.

Keep a running total of dollars raised as pledges are collected.

Provide regular updates to employees- send out email blasts, update thermometers, etc.

Make personal follow-ups with individuals who have not turned in their pledge as the campaign nears the end.

Wrap-Up the Campaign

Ensure all pledges are turned in. Collect payment for those who opted to make a one-time gift with a check or cash.

Schedule a meeting with your United Way representative to finalize the campaign- pick up the campaign envelope, extra campaign supplies, etc.

Report your final campaign results to employees and leadership.

Thank everyone! Send thank you emails, ask the CEO for a thank you message to communicate to employees, hang thank you posters. And don't forget to thank the committee for all their help!

Hold a final campaign committee meeting to evaluate your efforts and make recommendations for next year.

5. YEAR-ROUND ENGAGEMENT

Sign up for our e-newsletter to stay up-to-date on what's going on at United Way.

Share United Way updates and news with employees on a regular basis throughout the year so they can see the impact of their contributions.

Utilize the United Way's resource staff to organize group volunteer projects for employees and provide information about opportunities they can take advantage of on their own.

Use New Hire and Retiree packets to engage new employees outside of campaign season and allow retirees to continue their involvement.

Encourage leadership givers to participate in our leadership societies: the Leadership Giving Circle.

Participate in other United Way events or initiatives; Lumberjack Pancake Breakfast; Dining United; Day of Action; and more.

Analyzing Your Campaign

Analyzing Your Campaign

Determining Your Campaign Potential

GIVING POTENTIAL

Giving potential is a benchmark figure that represents an organization's departments, or individual's potential to give to the United Way Campaign.

It is calculated for an individual at the fair share giving standard of 1% of annual salary (i.e., Annual salary of \$30,000 x fair share standard of 1% = \$300 annual contribution). Potential figure for departments and organizations can be done in the same manner. A guide for evaluating the potential achieved of an organization is:

- + **Excellent Achievement:** 90% + of potential achieved.
- + **Good Achievement:** 60% to 90% of potential achieved.
- + **Average Achievement:** 30% to 60% of potential achieved.
- + **Minimal Achievement:** Under 30% of potential achieved.

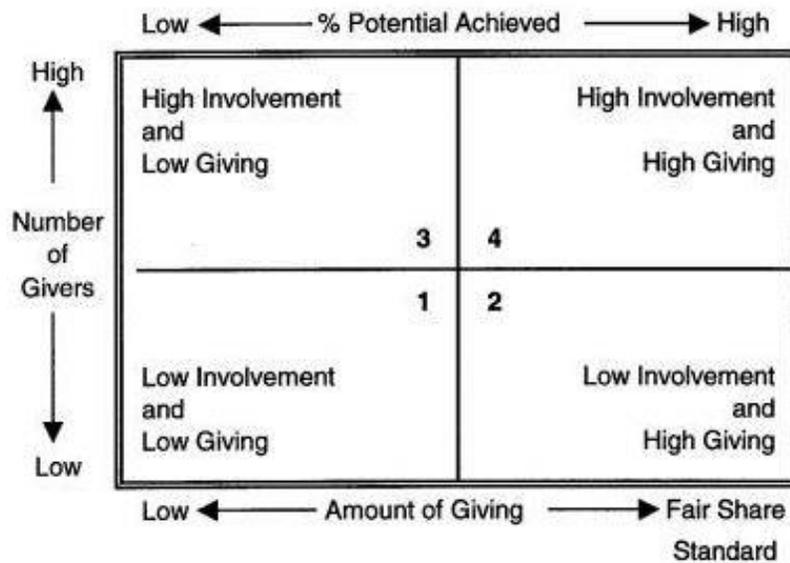
Opportunities for greatest campaign growth usually exists in the average achievement area.

EMPLOYEE PARTICIPATION

Employee participation is a figure that represents the amount of individual involvement in the campaign. Employee participation is calculated as a percentage of giving employees contributing to the United Way campaign out of the entire work force.

AVERAGE GIFT PER GIVER

The relationship of employee participation and size of contribution to potential achieved is illustrated in the following Potential Achievement chart:



Box 1: Organization has a weak campaign effort or a campaign in the initial start-up stage.

Box 2: Relies on a few good steady givers but does not have an effort to increase the number of givers. This is a sign of a “routine campaign” effort.

Box 3: Campaign asks all employees to get involved by giving something. Very high participation is often an indicator that campaign uses pressure rather than community needs as a solicitation strategy.

Box 4: Organization has good involvement and good giving amounts. Usually indicates a well-rounded campaign with good employee understanding and involvement at top management and other levels in the organization.

Calculations Formulas

+ **Percentage Participation:** # Givers divided by # employees.

+ **Average Gift:** Total Employee \$ divided by # givers.

+ **Per Capita:** Total Employee \$ divided by # employees

+ **Employee Potential (\$):** Total # employees x avg. annual salary (\$) x .01

+ **Potential Achieved:** Total employee contribution divided by total employee participation.

Your United Way contact person can assist you in conducting a Campaign Analysis.

Increasing Your Level of Giving

Increasing Your Level of Giving

When Setting a Goal

- + Calculate the total you wish to achieve.
- + Divide it by the total employment.
- + Share with employees what the gift per employee would be.

Examples: If everyone in our company, at a minimum, would give \$5 per paycheck we could raise \$4,000,000.

When Training Your Committee and Solicitors

- + Emphasize the goal is to increase giving.
- + Teach them how to ask people to increase their gifts.

When Promoting the Campaign

- + Emphasize how increasing individual gifts makes an impact.
- + Use incentives tied to giving such as a special gift for increased giving.

During Group Meetings

- + Be sure to share the campaign goal.
- + Avoid saying things like, "If you're already giving you don't have to sign up or just write 'same' on the card."
- + Ask for employees to increase their gift on their pledge cards (small increases add up).

Recognition

Recognize employees who increased their gifts on bulletin boards, in newsletters, within departments.

Do a special "Thank You" for employees who increased their gifts.

Increasing Participation

Increasing Participation

COMMITTED CEO

- + Involved financially and/or personally to the United Way
- + Provides time and support to the campaign committee
- + Provides time and personal support to employee meetings

COMMITTED TOP MANAGERS

- + Own personal involvement
- + CEO or peer contact

LABOR/UNION ENDORSEMENT

COMMITTED INTERNAL CAMPAIGN STRUCTURE

This could be in the form of campaign committee representing all departments.

- + Marketing/Public Relations
- + Payroll
- + Line People
- + Middle Management
- + Human Resources
- + Upper Management
- + Labor

CLEAR AND OPEN LINE OF COMMUNICATION

- + Between CEO/campaign committee
- + Between campaign committee and employees
- + Between campaign committee and the United Way

TRAIN AND EDUCATE CAMPAIGN COMMITTEE

Tell them about:

- + United Way
- + Community needs and how they can meet those needs
- + Allocations
- + Volunteerism
- + New hire's program
- + United Way at Work
- + Explanation of the correlation between campaign giving and participation.

ANALYZE PAST CAMPAIGN

- + Overall company campaign
- + Departmental campaign

Example: Looking at the number of participants versus the number of employees.

DEVELOP GOALS BASED ON INCREASED PARTICIPATION

- + Departmental goal
- + Company goal

MOTIVATE / EDUCATE EMPLOYEES

- + Use of campaign materials a. posters b. thermometer c. brochures
- + Introduce United Way campaign theme
- + Tours
- + Have two levels of incentives a. New givers b. Current givers
- + Introduce the idea of team-spirited competition between departments

GROUP MEETING

- + Set time and date or dates where management can endorse the company's involvement with the campaign.
- + Departmental representative speak on behalf of the committee and the United Way explaining the plan of action. a. Goal b. Theme c. Incentive program d. Community needs
- + Speaker
- + Testimonial
- + Video
- + Personalized pledge card
- + ASK!

THANK YOU / RECOGNIZE THOSE WHO HELP

- + CEO
- + Upper management
- + Middle management
- + Line employees
- + Campaign Committee

Examples: Thank you lunch, Have the CEO cook, Pass out awards, Recognize departments, Pass out incentive gifts, Attend United Way luncheons.

IMMEDIATELY EVALUATE AND MEASURE THE RESULTS OF YOUR CAMPAIGN WITH:

- + CEO
- + Campaign committee
- + United Way staff person

ROTATE, ELEVATE, AND DRAW IN NEW EMPLOYEE REPRESENTATIVES TO THE COMPANY CAMPAIGN COMMITTEE

ASK NEW HIRES TO CONTRIBUTE TO UNITED WAY

Encouraging Leadership Giving

Encouraging Leadership Giving

Leadership Giving (gifts of \$500+ annually) is a proven strategy to enhance your workplace campaign results. Leadership donors lay the foundation for United Way to improve lives and build strong communities.

By giving at the leadership level, donors have the opportunity to join one or more of United Way's Leadership Societies and Affinity Groups, which offer your employees opportunities to:

- + Build leadership skills and professional networks
- + Gain a closer connection with our community
- + Celebrate their joint leadership-level investment

Leadership Giving campaigns are also great for your company campaign. Running a strong Leadership Giving campaign allows your company to:

- + Express your company's values
- + Build leadership skills within your employees
- + Engage your leadership in the community
- + Retain valuable staff and foster loyalty
- + Build your organization's reputation
- + Achieve your corporate social responsibility goals
- + Improve employee morale
- + Increase the resources raised during your campaign

LEADERSHIP LEVELS OF GIVING

Tocqueville Society (\$10,000 +)

The society is named for the 18th century French explorer, Alexis de Tocqueville, who wrote of the generosity of the American spirit in his work Democracy in America.

The Leadership Society (\$500 to \$9,999)

United Way of 1000 Lakes currently has more than 100 Leadership members.

Benefits of Membership:

- + Featured in our Annual Report
- + Option to participate in leadership donor recognition events
- + For more information contact Kimberly Brink Smith at 218-999-7570 or by email.

Campaign Supplies, Materials & Resources

Campaign Supplies, Materials & Resources

Now that you know the basics, it's time to "dress up" your campaign with brochures, posters, goal thermometers, LIVE UNITED T-Shirts and more. Order your supplies (call 218-999-7570 or download order form) and we will deliver them to your door.

- + Campaign Brochure (PDF)
- + Pledge Form (PDF)
- + Campaign Posters (PDF)
- + Goal Thermometers (PDF)

- + Flyers
 - What Your Contribution Can Provide (PDF)
 - Where the Money Goes... (PDF)
 - How United Way Works (PDF)
 - Why United Way (PDF)
 - The Power of Leadership Giving (PDF)
 - Did You Know...(PDF)

- + Campaign Letters and Emails (Personalize with your company name and information.)
 - Leadership Solicitation Letter (DOC) (PDF)
 - Leadership Thank You Letter (DOC) (PDF)
 - CEO to Employees Letter (DOC) (PDF)
 - Letter to Retirees/Volunteers (DOC) (PDF)
 - Letter to Union Members (DOC) (PDF)
 - Thank You from United Way (DOC) (PDF)
 - Thank You to Employees (DOC) (PDF)
 - United Way @ Work (PDF)
 - A-to-Z Guide for Giving Thanks (PDF)

- + Jeans Day Supplies: Stickers, Labels, Jeans Day Cards/Passes

- + Wear Plaid Day: Posters, Buttons, Stickers

- + Logos
 - United Way LIVE UNITED logo
 - LIVE UNITED with United Way logo
 - Call to Action: GIVE. ADVOCATE. VOLUNTEER.
 - LIVE UNITED

Order New Hire and Retiree Packets

New Hires & Retirees Programs Make a Difference!

In today's fast changing job market employees are moving from job to job or retiring at a faster than ever rate. This results in a 6% to 7% loss of pledges through payroll deduction for United Way annually. One way to offset these losses is to ask employees to give as they begin their new job and to ask retirees not to forget United Way as they begin their new path.

Benefits of a Retiree Program

The Retiree Program offers the opportunity to continue financial support and acquire an outlet for opportunities to volunteer in the community.

- + A trusted and familiar source for making charitable contributions
- + A way to remain informed about United Way and its funded agencies
- + An easy path to support programs important to the entire community
- + An opportunity to discover new volunteer involvement
- + Potential automatic pension deduction to make giving easy
- + Invitations to special social events, workshops, and volunteer gatherings

Many of our companies introduce United Way as part of their orientation and exit programs and we are asking you to join them. We have folders available for use at your company in which a pledge form and brochure can be placed.

For more information on starting a New Hire or Retiree Program at your workplace or if you are retired and would like to stay involved with United Way, please contact Kimberly Brink Smith at 218-999-7570 or by email.

Communicating the United Way Message

Communicating the United Way Message

United Way Message Platform (PDF available online)

Effective Presentations

One-on-One Presentations

One-on-one presentations can be very effective in encouraging participation in the campaign. These presentations should be conversational, with no pressure. Peer-to-peer presentations work best. Ask steering committee members and/or team leaders to make presentations too. Make copies of the “Making the Ask” for team members to prepare for their one-on-one presentations.

PLAN

- + Make your own donation before asking others to give.
- + Schedule 5 to 10-minute appointments.
- + When scheduling meetings, explain the purpose of the meeting and how long you expect it to take.
- + Schedule meetings in person or on the phone. Confirm by e-mail.
- + Meet first with employees you know well.
- + Promote the campaign before you meet with employees.

ORGANIZE

- + Personalize the pledge form and don't forget to bring extra pens to the meeting.
- + Bring United Way brochures and suggested giving guide (below).
- + Prepare your presentation, but keep notes to a minimum. Do not read a statement to the employee. Refer to notes only to keep you on track; speak personally to the employee and use a lot of eye contact.
- + Plan for no more than 2-3 minutes for your presentation. Use the remaining time to discuss concerns and answer questions.

MEET

- + Review the purpose of the meeting.
- + Explain the purpose of the employee campaign and how it supports United Way
- + Describe what United Way does and how it impacts the community.
- + Tell the story - describe your personal experiences observing the impact of United Way.
- + Mention three or four community needs that you think are most relevant to the person you're meeting with. The point you're making by explaining these needs is the necessity for continued support.
- + Ask questions and listen for clues that tell you about the interests, activities and motivators of the employee you are meeting with. Find ways to tie giving to things that motivate the employee.

Note: Do not utilize questions or wording that could imply judgment. For example, to probe for areas of interest in community service, ask which community needs are of most concern to the employee, not whether he or she currently gives or volunteers to any charities. Remember that the decision to give is highly personal.

- + Watch for signals that the employee is connecting with the message. Signals can include frequent nodding, smiling, becoming enthusiastic, interjecting personal stories, offering to help or providing suggestions for the campaign. Be flexible in your presentation so that you can move in a direction that the employee responds to whenever you see these signals.
- + Ask for the pledge. Here are three ways:
 - + "If you contributed last year, please consider increasing your pledge."
 - + "If you haven't participated in a workplace campaign before, please consider doing so this year."
 - + "Remember that payroll deduction makes giving convenient and also allows you to spread your giving over the course of a year."

For information on handling objections and tough questions, see "Making the Ask"

FOLLOW UP

- + Thank the employee for his or her time.
- + Encourage the employee to fill out the pledge card during the meeting.
- + If the employee chooses not to fill out the pledge card during the meeting, but indicates a willingness to contribute, set up a time when you can pick up the pledge card, and confirm with an e-mail when you return to your desk.

SUGGESTED GIVING GUIDE

IF YOU EARN THIS PER YEAR:

Up to \$19,999
\$20,000 to \$29,999
\$30,000 to \$69,999
\$70,000 to \$99,999
\$100,000 and up

CONSIDER A GIFT OF THIS AMOUNT:

one hour's pay per month
1%
1.25%
1.50%
2.00% +

Group Presentations

Without question, a presentation of some sort - whether it is one-on-one or to a group - is essential to the success of your campaign. Talk with your United Way staff person to determine which type of presentation is best suited for your organization.

A presentation is not only an excellent opportunity to provide employees with information about how their contributions will be invested to improve the health of the community, but also gives them the opportunity to ask questions about United Way.

GOALS OF THE PRESENTATION

- + To outline our community's needs
- + To educate employees on how United Way is uniquely qualified to ensure contributions have the greatest impact.
- + To request a charitable United Way contribution.

PLAN

- + Make your own donation before asking others to give.
- + Promote the campaign before you meet with employees.
- + Announce the time frame for your campaign.
- + Choose a time and place that is convenient to the most people possible.
- + Invite your United Way representative and/or an agency speaker to attend.
- + Personally invite employees to attend. The ideal size is 25 to 50 per presentation.
- + If possible, use incentives to encourage people to attend (food, door prizes, etc.)

ORGANIZE

- + Games and decorations can make your presentation fun.
- + Personalize the pledge forms and don't forget to bring pens. (United Way can help you with personalization)
- + Order supplies and materials including brochures, table tents, video (when available) and PowerPoint templates. Test the projection system prior to the meeting to assure smooth operation during the meeting.
- + Prepare your presentation, but keep notes to a minimum. Do not read a statement to the employees. Refer to notes only to keep you on track; speak conversationally and use a lot of eye contact.
- + Plan for no more than 20 minutes.

MEET

- + Pass out pledge forms to all employees personally (don't leave them on a table for employees to pick up). Encourage employees to fill out the pledge cards during the meeting if they choose to give.
- + Opening remarks (2 minutes) - your department head should open the meeting with a few words about the company's history of employee campaigns and his or her commitment to this year's campaign.
- + Overview (5 minutes) - your United Way representative will explain investments that United Way makes in your area and the counties served by United Way and its funded agencies. The speaker can give vivid illustrations of donors' dollars at work by telling the stories of people whose lives have been changed.
- + Show a United Way video (3 minutes)
- + Ask for pledges (1 minute) – the ask should come from the team leader, a fellow employee or a campaign team member who has already given.
- + Questions (2 minutes) - End the meeting on time by thanking the employees for coming. Do not answer questions from the floor but say that you and the United Way representative will be available to answer additional questions after the meeting.

FOLLOW UP

- + Collect all pledge forms.
- + Distribute incentives.
- + Follow up with those who missed the meeting.

TECHNIQUES TO AVOID

- + Assuming that people already know about United Way.
- + Asking people to speak to employees without providing them with talking points.
- + Dropping off pledge forms without explanation.
- + Mailing pledge forms to employees (historically, this has been the least effective option)
- + Arguing with people who have concerns or questions (your United Way representative can provide answers to questions, if needed).
- + Making a gift mandatory. United Way is opposed to any type of coercion - it is contradictory to our operating standards.
- + Remember, When people are asked why they did not give, the most often heard response is... "I was never asked!"

Speakers Bureau

Speaking presentations personalize United Way to your employees and communicate the needs of the community. A presentation can be tailored to your time constraints from five to fifteen minutes. Use the Campaign Order Form or call Kimberly Brink Smith or by email to set up a speaker for your campaign presentation.

Donor Choice Program

Undesignated pledges are directed by United Way allocations teams to where they are needed most in our community. However, we respect the rights of our donors to fulfill their philanthropic intentions. Review our complete Donor Choice Policy.

Social Media

Follow us on social media to stay up-to-date on the impact United Way is making in the community. Spread the word about your United Way campaign.

- + Facebook
- + YouTube
- + Twitter
- + Instagram

Go Online!

Create your own fundraising page to enhance your United Way campaign. This system is designed to offer companies the option of running an online campaign or create peer-to-peer fundraising pages using a convenient and secure website hosted by United Way of 1000 Lakes.

For more information, or to set up your company's fundraising page, call 218-999-7570.

Questions? Contact your campaign staff person.

Donor Choice Program

Donor Choice Program

In keeping with our mission to improve lives by mobilizing community resources to advance the common good and to allow our donors to fulfill their philanthropic intentions we offer the following options:

- + Our donor choice program is comprehensive, allowing designations to other United Ways, affiliated agencies, three impact areas, and exclusion of any affiliated agency.
- + A donor may designate a portion or the full amount of his/her contribution to eligible organizations. Eligibility for designations requires an organization to be qualified as an IRS 501c3 agency, and verify their compliance with the current anti-terrorism requirements.
- + United Way of 1000 Lakes has a “no promotion” policy that prohibits any organization from asking or encouraging donors to designate to them. Penalties, including suspension of eligibility for designations, will be imposed for clear and unequivocal violations.
- + Designations to non-funded agencies are unrestricted as to their use by the agency; they are not subject to specific program application and United Way can provide no oversight as to their use.
- + Designations to Impact Areas are allocated to affiliated agency programs within the impact area; they enable our investment teams to apply annual with the option of additional funding to programs that need and merit more funding.
- + Donor requests to exclude a United Way affiliated agency from receiving their contribution are implemented by distributing the contribution to every other affiliated agency other than the one excluded; this allows a donor to support community services at all other United Way affiliated agencies except for the one he/she does not want to support.
- + Every dollar that is designated to non-funded agencies reduces the Community Investment pool and results in less funding to apply to programs that meet the greatest needs in our community and produce measurable results and outcomes.
- + United Way of 1000 Lakes charges a processing or administrative fees for donor designations to non-funded agencies. Agencies receiving funds through grants are not assessed a fee.
- + The amount of designations paid by payroll deduction is based on company/business collection experience. Employee designations from employers that do not release individual payroll deduction payment information to us are paid net of the collection experience at each employer.

DONOR PRIVACY

Information you provide as a donor to United Way of 1000 Lakes is used only to properly credit contributions provide recognition and communicate about our work. We respect the privacy of our supporters and do not rent, trade or sell our information.

Guide to Making the Ask

Guide to Making the Ask

People give to United Way for many reasons, but the number one reason people do not give is because they weren't asked. Below you will find downloadable pledge cards, and some additional resources to help you "Make the Ask."

ASKING ONE-ON-ONE

United Way's research shows a peer-to-peer ask is the most effective way of asking for a pledge. Sincerely communicating your commitment to supporting the community through United Way really does make a difference. Leaving pledge cards in employees' mailboxes and hoping they will be returned is not recommended.

- + Know how United Way advances the common good in the Itasca County area
- + Ask for a specific increase or first-time gift
- + Handle concerns. See "Managing Objections" below
- + Say thank you, regardless of what the donor decides

ASKING IN A GROUP SETTING

Company campaign kickoff and special events are a great way to introduce employees to United Way and ask for a donation.

- + **Determine who will make the ask.** Many companies choose their CEO to make an ask during an event. He or she can discuss why your company chooses to support United Way, your company goal and the impact United Way has on our community.
- + **Invite a speaker from United Way**
- + **Distribute pledge cards or inform employees how to pledge through on-line campaigns.** Hand out personalized pledge cards at the event and offer incentives to those who turn them in.
- + **Make the ask.** Close the event with one call to action: make a gift.

MANAGING OBJECTIONS

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 campaign staff member.

I already give directly to XYZ charity. Why should I give to United Way?

Giving is a personal decision, and it's great that you've found a cause with which you identify. One thing to keep in mind is United Way works across dozens of causes, so when you make a gift to United Way, you are not only supporting one cause, but a variety of important issues. I encourage you to take a look at United Way's brochure to see the initiatives and programs United Way supports.

I can't give a lot so my donation won't have an impact.

Every dollar really does make a difference. The great thing about United Way is with so many people choosing to help, when we each give a little, it has a huge impact. I hope you will consider supporting our region through United Way in a way that makes sense for you.

My spouse gives at his/her company. Why should I give my own gift to United Way?

Thank you for your spouse's donation! Many couples choose to give at both workplaces because they want to participate with their coworkers. It's also a great way to support your individual companies.

United Way supports an organization or a cause that I don't like.

It's important that you feel comfortable with your decision to donate. Although you may not care for one agency, United Way supports programs within many other agencies that serve people in our community. Without the support of the community through United Way, many of these important programs and services would not exist.

Donors can request to exclude a United Way funded agency from receiving any of their contribution through the Donor Choice Program.

Fun Event Ideas

Fun Event Ideas

Food

Themed Food Day

Employees cook their favorite dishes and pay to eat – with proceeds going to United Way. Have a contest for the 'Best Dish.' Get a trophy at the Dollar Store and give the trophy to the winner.

Chili or Soup Cook-Off

Spaghetti Dinner

International/Ethnic Food Day

Side Dish Day

Bake Sale

Homemade or store bought items are brought in such as: cookies, pies, muffins, bars, cupcakes, fudge, and candy. Arrange baked items on a table to be seen and purchased throughout the day.

Christmas Cookie Sale

Call bakeries for cookie bids or make your own. Determine the cost and selling price. Have sign-up sheet to take preorders.

Potluck Luncheon

Participating employees bring a hot-dish, appetizer, salad, side, dessert, etc. to be shared. Paper products are also needed for this event. Employees pay to fill their plate and sample everything in the room.

Root Beer Float Sales

Seek donations or purchase root beer and vanilla ice cream. This popular event works well during lunch and breaks in the summertime. Remember a freezer will be needed to store the ice cream if the event is held all day.

Snack & Dessert Cart

Employees donate items; several carts travel around the building in the morning and afternoon and offer treats at a minimal cost. A new twist on the traditional bake sale.

Theme Lunches

Add fun to campaign week by hosting a theme lunch such as 50s, 60s, 70s, or 80s, holiday themes, TV shows, sports, etc.

Top Managers Cook for Employees

Have top managers cook a special breakfast for all donors. Another way to demonstrate employee appreciation.

More Food Ideas

Hot Dog Topping Bar

Top Your Sundae Bar

Baked Potato Bar

Smoothie Bar

Food Truck - Get a food truck to come on site. Some will donate a percentage back to the company.

Games and Contests

“Fear Factor” Game

Group of executives are challenged to face off in events ranging from eating food blindfolded to picking items out of jars full of worms.

Identify the Baby Photo Contest

Employees bring in a favorite baby picture, writing their name on the backside. Pictures are numbered and posted on a bulletin board. Employees purchase a chance to match co-workers with baby pictures. When purchasing a chance, give purchaser a numbered sheet with blanks to write their guesses. Have them put their own name at the top and turn in. Employee with the greatest number correct wins a prize!

Indoor Mini Golf

This indoor event is great for swinging away those winter blues! To make the event a contest, have each department design a creative hole using only materials already in their department. Examples include: wastebaskets, letter trays, reams of paper, machine parts, etc. If possible include a shot from the roof. The employee committee rounds up some clubs and staffs the course during the lunch hour for the week of the campaign. Employees play the course as often as they like for a small fee. Prizes are awarded to the department with the most creative hole and to the best mini golfers.

Kiss Our Community

Purchase a large helium balloon in the shape of kissing lips and attach the balloon to a gift wrapped brick. Lay this 'kiss' on the desk of one of your co-workers and let the fun begin. Each person that gets 'kissed' will need to make a donation to your cause. For example, they could donate \$1 to remove the kiss from their office and return to the coordinator; donate \$2 to remove the kiss and THEY get to choose the next person to kiss; a \$3 donation allows someone to steal the kiss from the current victim and choose the next person to kiss; a \$25.00 donation means they will never be 'kissed' again. Those who have donated \$25 will get a notice on their door/desk so everyone is aware of who is still kissable. Be sure to put a time limit on moving the kiss so it will not sit on one desk too long.

Let the Race Begin

For this auto-racing theme, create a large goal poster that looks like an Indy racetrack to set the pace of your campaign race. Use Velcro cars to measure progress along the track as the company moves closer to the finish of the campaign. Decorate main room with race flags, jerseys and racing posters. Hold your own race with radio-controlled cars in the parking lot.

Life is Not a Spectator Sport - Go the Distance

At the start of the campaign, hold a kick-off meeting explaining touchdowns (accomplishments of previous years), penalties and receptions (areas needing improvement), and huddles (ideas for the coming campaign). To launch the campaign, hold a tailgate party in the parking lot or at a park. Arrange to have the party at the same time as a local baseball game and cheer on your home team. Throughout the campaign hold sport fundraisers such as a slam dunk/shootout contest, volleyball tournament, football toss, etc. Rubber Ducks, Gophers, Vikings or Wild tickets or tickets for other local teams make great prizes.

Movie Trivia Quiz

This quiz can be completed at workstations & returned to an appointed person to tally the scores. You can match the actor/actress with the movie, match the quote with the movie, or combine. The highest score wins a prize. In case of a tie, a drawing will be held. Winners can be announced at a group lunch at the close of the campaign.

The Price is Right

Let employees guess the "retail value" of services provided by United Way's funded agencies. The one who guesses closest without going over gets to come on down to play a game based on the classic Price is Right game show.

Pumpkin Decorating Contest

Employees form teams and create their own unique design using pumpkins. The pumpkins are displayed in the company cafeteria and employees vote for their favorite pumpkin by placing money in that team's container. The winning team is awarded a prize pack containing gift certificates and other goodies.

Jeopardy

Have 5 - 10 answers about United Way, the agencies, etc., on a board. Make up play cards/answer sheets and have the employees write down the questions & drop them in the box.

Wheel of Fortune

Have several puzzles related to United Way, such as the campaign chair, funded programs, theme for that year, etc., (give them vowels for free) and have employees write down their guesses & drop them in the box.

Family Feud

Using a statement from the campaign materials like: "United Way agencies that support Aging People." Have the employees list the agencies on a sheet (assign equal points to them).

Who Wants To Be A Millionaire

From the list of donors, draw out names randomly to be the contestants? Ask them to name three United Way agencies that help kids (or aging adults, families, etc.) Whoever writes them down the fastest and raises the paper in the air gets to play first. Using the United Way brochure or website, put together some questions about United Way and the agencies for the contest. (Call the United Way office if you need help.) Use play money for prizes.

In Bad Taste

Executive team members wear their ugliest ties, jewelry, shoes or hats. Employees vote for the ugliest item, paying \$1 per vote. The executive with the most votes at day's end is declared the winner and may be awarded a prize.

Look-A-Like Contest

Employees are encouraged to dress up like famous personalities. Co-workers then pay to vote on the best costume with the contestant receiving the most votes winning a prize.

Department Penny Jar

Each department is designated a jar. Employees are encouraged to fill their own department's jar with pennies, each equaling one point. Opposing departments may then add other coins to their jars that are equal to their value only negative (ex: A dime is minus 10 points). The department with the most positive points at the end of the week is awarded a prize.

Tug-of-War

Have an interdepartmental competition. Each team pays a fee for entry with the winning team winning a prize.

Kiss the Pig

Employees vote through contributions to executive labeled piggy banks for the boss who must kiss the pig.

Traveling Trophy

Companies with multiple locations have found that using a traveling trophy generates friendly competition and is a great sign of pride for the location. Trophies may be used for any number of contests including location with the highest participation, raising the most special event dollars, etc.

Silent Auction

Simply gather items and create bid sheets, being certain to provide a minimum bid for each item.

Dress-up the Boss

Boss wears a costume voted on by all employees if the campaign goal is reached. Examples: tutu, animal costume, devil costume, etc.

Guess How Many

Guess the number of jellybeans, M&Ms, pennies or other items in a jar. Buy chances to guess. Closest guess receives a prize.

Recycled Goods

Turn in recycled paper, cans, bottles, etc. and exchange them for money for the United Way.

Best Photo Contest

Employees submit photographs taken at campaign and celebration events. Photos are displayed on a bulletin board and judged by committee, with the best photo receiving prizes such as a new camera, photo album, or a camera carrying case.

Food Fight

Divide into two or more teams and elect captains. Team members collect money and turn in to captain. Team raising the most money is awarded a pizza/sub party, which they may verbally throw into their competitor's faces.

Tourney Time

Hold a broomball, softball, tee-ball, kickball, racquetball, tennis, volleyball or ping-pong tournament.

Karaoke Contest

Hold a contest to determine who has the best and worst karaoke talent. Coworkers may buy votes ahead of time to elect the "Star of the Show" who will sing the first song. Charge an entrance fee for the show.

Jail and Bail

Hold in correlation with an employee picnic or carnival. Have a "Catch and Cuff 'Em" Jail booth where employees pay to have co-workers, supervisors, managers or executives incarcerated for short periods during the event.

Slogan Contest

Employees develop in-house campaign slogans/themes. The committee picks the top ten, which are then voted on by the entire company, the winner receiving an award.

Teambuilding

Reach for the Goal

Tie together the title with an Olympic theme. The company wins the gold medal when the campaign goal is reached. Create a poster with a bronze, silver and gold medal goal. The Opening Ceremonies are the kick-off to the campaign, explaining the goal and theme. Symbolic passing of the torch from last year's campaign chair to the new chairperson.

Hold a mini-Olympics with employees forming teams of three or more. Events include hula-hoop relay, tricycle race, basketball dribble, tug-of-war, 100-yard dash, mile relay, and sack race. Winter Olympic events include cross-country ski relay, the luge (fastest sled), tug-of-war in the snow, best snow sculpture, team member's push-pull each other in a sled race and snow football. Charge an entry fee for teams, offering prizes for the winning team along with souvenir gold medals. Conclude the Olympic campaign with an awards ceremony, awarding Olympic winners as well as all employees for their campaign efforts.

Tricycle Races

Create teams each with of three to four riders. Teams are named and publicized in advance, allowing employees to make pledges or bets on the winning team. Team members ride large tricycles (rent or arrange to borrow from a cooperating store) through a predetermined course through the office. Possibilities include: through hallways, lunch/break rooms, around cubicles, chairs, and in and out of offices. Have course marked with signs or tape on the floor. Fans are able to watch and cheer from different areas around the office. The race is designed as a relay. Team members may pass off a flag, pinwheel, teddy bear or similar item to their succeeding team member. Remember to take pictures for the company bulletin board or newsletter!

5K Run or 1 Mile Walk

Plan a route and hold the event at lunchtime or after work. Charge \$5 to participate.

Themed Parties

Caribbean Party

For those who don't want to grow up like Peter Pan, this event will be a lot of fun. Decorate meeting room or lunchroom with cut out palm trees, starfish, waves, etc. Bring in shells and fishnets to add to the decor. Bring in a chest with a key that will be your treasure chest, fill it with secret prizes. Otherwise make a treasure chest out of a large cardboard box with gold and silver foil pasted on the outside. Employees purchase a key (either real or cut-out cardboard keys) from a volunteer dressed in a pirate costume. Cutout keys are numbered and the winner of the treasure chest is determined by a drawing. Real keys are tried in the lock, the winner is the person with the actual chest key. Make a treasure map and mount it on the wall. The display shows the progress toward campaign goal with a pirate ship crossing an ocean, in search of desert islands, with an "X" to mark the spot (goal).

Wild West

Employees dress in cowboy/cowgirl attire. Works well with a BBQ or chili cook-off.

Grease

Have employees cast ballot for which members of the Executive Team should dress up like which characters in the musical Grease (or any other popular movie/play). Have them stand in front of the assembly of employees and let employees pick the best look-alike by loudness of applause.

Ugly Holiday Sweater Party

Everyone dresses in their favorite ugly holiday sweater and the most ugly wins a prize.

Other Great Ideas

Jeans Day/Casual Day

Allow employees to dress down for a donation to United Way. Your United Way contact person can provide buttons that say 'Jeans Day for United Way' — just ask!

Or print your own (available on-line):

- + Jeans Day Stickers
- + Jeans Day Labels
- + Jeans Day Cards/Passes

Craft Sale

Advertise the craft sale ahead of time in the company newsletter, bulletin board, email enabling participants time to make (or buy) crafts. Place items on a display table, each with its own jar to place purchased chances. Employees purchase chances, fill out name and place it in a jar corresponding to the item they desire (example: \$0.25 each or 5 for \$1.00). Run the sale for a week, allowing employees to check each day on their odds by looking at the number of tickets in the jars. At the end of the week, the Committee draws names and delivers the items to winners.

Diamond Donors

Look for the “diamonds” in your company. Diamond Donors are folks that have contributed to United Way for 25 years or more. The company and their employees will be publicly recognized and the “diamonds” will be invited to special events.

Employee Car Wash

Recruit a team of car-washers (consider involving managers) and determine shifts. Team members bring sponges, rags, soap, buckets, hoses, radio, etc. on day of event. Set up wash site in employee parking lot. Wash tickets may be purchased in advance (\$3-\$5) or simply recruit cars on wash day. Car washers get keys from co-workers, pick up vehicle and bring to the wash site to be cleaned. Return washed cars to parking places. They never have to leave the office!

Employee Cookbook

Ask employees to bring in their favorite recipes from home. Research publishing companies to print the collected recipes in a book format, or do it in-house. Plan on a two to six month time period for the preparation and printing of the project. Take pre-orders after determining price per copy with the publishing company. Profit earned from the sale can be added to the United Way donation from your company. Order extra books for last minute shoppers.

Ornament Raffle

Buy or have donated an artificial tree, which can be stored and used annually. Employees bring in ornaments either purchased or handmade to hang on the tree. Tree may be kept up and ornaments collected for the entire Christmas season. After all ornaments are collected, most valuable ornaments are selected to be raffled first, giving all a fair chance at high valued ornaments. Employees purchase chances for the ornament raffle and names are drawn.

Shave the Boss's Head

Employees attempt to reach company goal. If they succeed or exceed the goal, boss agrees to shave off his or her hair (heads of hair or mustaches and beards for men). Create a chart to keep track of set company campaign goal. Have a photo image or drawing of boss without hair at the top, displaying result of reaching goal, or show progress posters with the slow removal of hair, as the employees get closer to the goal. Employees who make contributions are given the opportunity to vote on whether or not the CEO will have to shave. Host a celebration party with the boss shaving his or her head/mustache/beard at the event.

Book Sale or Rummage Sale

Two or three weeks before the sale, employees bring in sale items which volunteers price and sell day of event.

Easter Egg Raffle

Fill plastic Easter eggs with raffle numbers. People buy eggs or "chances" for prizes.

Wall of Fame

Put pictures on a wall recognizing employees who have been contributing for the most consecutive years.

Buck Coupons

Give everyone who attends campaign meetings a buck coupon that can be redeemed in the company cafeteria or company store.

Here's what some of our local companies did for their united way campaigns.

Minnesota Power

Minnesota Power kicked-off its campaign with a month of great events. There was a contest to see who could collect the most donations. Unfortunately, you could sabotage the other teams by adding to their jar. The employee with the largest total of donation was duck taped to the wall. The company held Bean Bag Game competitions, and Chili Cook-off fundraiser. The month was wrapped up with a fun hero photo booth. A raffle drawing is also held for a chance to win VIP Parking Space.

Itasca Community College

Itasca Community College hosted an ice cream social where employees make a donation to help themselves to the sundae and float bar.

Itasca County

Itasca County holds a variety of campaign events and incentives including Food Themed Lunches and Chili Open Houses for \$5 donation; Office/Cubicle Hopper (where a cardboard cut-out travels from workspace to workspace with donations to United Way); and employees who pledges a payroll deduction is entered into a raffle drawing for a chance to win a prize.

KOOTASCA Community Action

KOOTASCA selects a theme and plans a week of exciting events for employees. From reverse raffles and silent auctions to crock pot cook offs – the company builds momentum and excitement for participants.

Blandin Foundation

The large and engaged committee at Blandin Foundation looks for new and exciting ways to increase awareness of and contributions to United Way. This group always seeks to put a spin on classic activities such as drawings, jeans days, theatrical skits and company-wide themed dress up days!

UPS

UPS partnered with Schwan's foods. For each sale, Schwan's donated 20 percent of the purchases and 45 percent of the Gift Card orders to United Way.

US Bank

Its "Every Day for United Way" at US Bank, where the company celebrated with a week of fun events during its campaign. The series of low budget, fun events were designed to help raise awareness while generating more money for the UW programs. US Bank kicked off the week with a donut breakfast; then employees contributed baked goods, which were sold throughout the week; and bank costumes could purchase a piggy bank for a \$5 donation.

Minnesota Diversified Industries (MDI)

MDI had a great time with its campaign by holding fun special events for the employees. A Bingo Game and raffle drawings helped get everyone involved while raising money in support of United Way. Food proved to be a great incentive as well. A bake sale and ice cream social drew people in and helped garner more contributions to MDI's campaign. Perhaps the most creative event MDI held was "Pie-in-the-face" competition. Donation boxes were put up in the lobby, one for each of the employee volunteer participants, for a small donation, employees could deliver a "pie in the face" to the individual who raised the most money.

Incentives

A note about Incentives and Prizes

Token incentives or prizes are more effective than expensive items. Many people may react negatively to the idea of a lavish "reward" for giving to United Way. It can seem inconsistent with the spirit of United Way so use your best judgment. A good place to start is with your vendors for incentives. Your vendors may be able to provide gifts or loan merchandise. It is a great way for a company's vendors to show how much their business is appreciated while it spreads awareness of United Way.

Ideas for Incentives

1. Parking Place
2. Afternoon off of work
3. Lunch with the boss (out of office and the boss pays)
4. Movie/game/play tickets
5. Snooze day (allowed to come in late)
6. Golf with the boss
7. Car washed by boss or co-worker
8. Leave 1-hour early/come in 1 hour late
9. Office redecorated or cleaned — Trading Spaces
10. Gas and car wash gift certificates
11. Jeans on Fridays
12. Company promotional items

Guided Reflection

Guided Reflection

This Tool-kit is designed to help spark questions, ideas and conversations that will lead to campaign tweaks, recalibrations and ultimately, improvement. This Guided Reflection is just one more tool to help your team launch your upcoming workplace campaign.

What are you currently doing?

Is it what you want to be doing?

What could/should we be doing if we're not?

Who else should we talk to about this (for leadership, input, support, etc.)?

Notes

Guided Reflection

What surprised you most about the Coordinator training?

Did you find any areas where you can improve upon?

What are the barriers to what you want to accomplish

What are your strengths in the areas that are working well?

Notes

Guided Reflection

What are the easy first steps we can take to improve our campaign?

What are some of the more difficult changes that we need to consider?

Do we need additional (or different) resources from what we have now to make these changes?

What new questions we have now that we didn't have before?

Notes