

Campaign Best Practices

A look at outstanding United Way campaigns from local companies



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United Way Impact Fund Support

Advance Auto Parts

Norfolk Southern

Kroger Mid-Atlantic

United Parcel Service

SunTrust

StellarOne

Roanoke County Schools

The Roanoke Times

Key Points

- Talk about and explain the United Way Impact Fund proactively in campaign meetings
- Use poverty simulation and other impact tools to convey the needs being addressed by United Way funded programs
- Company Leadership should show support for the United Way Impact Fund
- ECMs should be able to answer questions about the United Way Impact Fund and explain its leveraging power



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Best Practices:

- WDBJ7 provides a higher corporate match to employees who give to the United Way Impact Fund. Each dollar receives a 75% match
- The General Manager participates in the Community Invest Process and recruits others to do so to increase awareness.
- All employees participate in a poverty simulation at campaign meetings to make the United Way Impact Fund's advantages more apparent

THE ROANOKE TIMES
roanoke.com

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Best Practices:

- Campaign Ambassadors attend a campaign training which includes learning about the United Way Impact Fund and how to share the information with fellow employees
- The President and Publisher volunteers for the United Way in on the United Way Board of Directors to ensure that measurable outcomes are produced by both the funded programs and United Way staff

Leveraging Company Match

Key Points

- ECMs should confirm company match in advance of launching the campaign as this can be a useful tool in motivating employees to give
- Make sure employees realize the benefits of the company match program
- Various companies offer a variety of ways to support the United Way with leveraging funds: 50 cents for every dollar, dollar for dollar match or matching donations made to the United Way Impact Fund
- United Way credits individuals in the annual leadership registry for both their gift and their respective portion of the company match, making it easier to join a leadership giving level

Local companies offering a corporate match on employee donations:

Ace Private Risk Services

Appalachian Power

Allstate Insurance Company

Anthem Blue Cross and Blue Shield

Boxley

Carter Machinery

Cooper Industries, Crouse-Hinds Division

Erie Insurance Group

First Team Auto Mall

Lawrence Transportation

Nationwide Insurance

nTelos

One Beacon

Pepsi Bottling Group

Pfizer

RGC Resources

Trane

WDBJ7 Television

xpedx

Utilizing a Team Approach

Key Points

- All employees should be asked to give personally by someone within the company – in large companies this often means having a team of ECMs instead of one
- Teams allow for more ideas to be shared and creative campaigns to take place
- Opinions from different departments or divisions within the company help to address each area with the right kind of approach for them (production based employees may need a different approach than office based employees, for example)
- Having a team working the campaign makes it not only easier to make the personal ask to each employee but also in thanking donors individually for their contributions and keeping them in the loop about United Way



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Best Practices:

- There is one lead ECM that puts together a campaign team
- The campaign team has breakfast meetings to brainstorm ideas for the campaign
- Throughout the campaign, the team divides the campaign responsibilities and marks the progress



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Best Practices:

- The lead ECM and his team manage the entire campaign and secure incentives
- The team approach enables the team to make sure that every employee is able to have the opportunity to donate

Leadership Giving Campaigns

Leadership Giving Leaders	
Carilion Clinic	195
Advance Auto Parts	185
Kroger Mid-Atlantic	118
ITT	75
Norfolk Southern	67
SunTrust	50
Wachovia	41

Moving the Needle in Your Campaign

Leadership Giving is your company's greatest opportunity for campaign growth. Leadership giving accounts for approximately 40% of all dollars raised at United Way of Roanoke Valley. Plan your Leadership Giving campaign by:

- Reviewing who gave last year
- Analyzing potential prospects – middle management and above
- Planning how you will ask/talk about the United Way and its benefits
- Planning how you will say thank you

Key Points

- Plan a separate kick-off for Leadership Givers and ask a senior executive to speak
- ECMs should know the past leadership donors and make a personal visit for the ask
- Explain the leadership giving levels and distribute the leadership registry to current and potential leadership donors
- United Way holds thank you events for all leadership givers
- Inform all employees that names of Leadership Givers are listed in the annual United Way Leadership Registry



A Unit of American Electric Power

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Best Practices:

- Run a leadership campaign before running the companywide campaign
- Provide breakfast or lunch for all attendee
- Distribute campaign information to Leadership Givers such as a pledge form and Leadership Registry
- The ECM should make an appeal to potential Leadership Givers on behalf of the company

Innovation

Key Points

- Being innovative with your campaign can help increase **United Way's year-round** presence within your company
- Begin a new hire program— **you don't have to wait until** campaign time to add to your campaign total. When a new employee is hired, give them the opportunity right away to give through payroll deduction for the remainder of the year and inform United Way of their pledge
- Agency tours and speakers— Contact your United Way Development Associate to arrange a United Way Impact Tour or beneficiary speaker to help educate employees about community needs
- Advocate volunteering — recruit employee teams for United Way Days of Action projects. This allows employees to give back and understand the needs in the community
- Corporate giving—if the employee campaign is short of its goal, ask the company to provide a matching incentive for reaching the goal



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Best Practices:

- Use creative campaign themes, such as an Alaskan theme
- Have fellow employees dress the part of the theme, especially the CEO or President
- Decorate the office to fit the theme
- Provide a meal or snack that features cuisine of the theme



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Best Practices:

- Create a signature item for your United Way **campaign, such as 'Live United' chocolate bars**
- Provide an assortment of incentives to fit a variety of donor interests
- Have fun with every aspect of campaign, like having a live/televised drawing for raffle prizes

Special Events

Special Events Leaders

Roanoke County Employees

Carilion Clinic

Kroger Mid-Atlantic

Elizabeth Arden, Inc.

Cooper Industries, Crouse-Hinds Division

Western Virginia Water Authority

Integrated Textile Solutions

Key Points

- Special events can be a fun component of your workplace campaign
- Special events are a great way to raise additional funds, create awareness of United Way, promote team spirit and set the stage for supporting United Way
- Provide incentives for returning sign pledge form at the event, or making an e-pledge by the end of the day
- Holding a special event is a great way to supplement your campaign to offset areas of loss, such as a reduction in corporate giving or a decrease in number of employees due to downsizing

Special Event Ideas

Potluck Lunch	Raffles
Mid-day movie for two	Costume Contest
Jean Day	Golf Tournament
Car Wash by CEO	Tailgate Party
Ice Cream Sundae Party	Crazy Tie Day
Baby picture-guessing contest	Department Penny Wars
Company Picnic	Chili Cook-off

Best Practices:

- Schedule United Way Night with local restaurants such as **Applebee's or Abuelo's and donate 10% of the proceeds to UWRV**
- Hold employee gatherings such as cookouts, pancake breakfasts, or yard sale



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THE HOTEL ROANOKE & CONFERENCE CENTER
A DOUBLETREE HOTEL

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Best Practices:

- Hold special events that go beyond the company and into the community
- Hotel Roanoke holds a **'Fashion for Evergreens'** event, in which the community votes on their favorite decorated Christmas tree and the proceeds go to United Way of Roanoke Valley

Participation

Participation Leaders

Anderson & Reed	100%
First Citizens Bank	100%
Hometown Bank	100%
Dixon, Hubard, Feinour & Brown	100%
Valley Bank	95%
Boxley	90%
Thomas Rutherford	85%

BOXLEY

AGGREGATE • BLOCK • CONCRETE

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Best Practices:

- Secure full support from top management
- Hold campaign meetings at all locations and offices
- Provide donors with information about their **previous year's gift and information about company matching**
- Encourage employees who are also UWRV beneficiaries to share their story during the campaign
- Provide a companywide incentive such as 100% participation earns all employees a paid day off
- Be sure to make a personal ask of all employees

Key Points

- The major reason people do not give is because they are not asked—a personal ask should be given to everyone
- ECMs should ask for all employees to return their form, regardless of whether they chose to give
- Identify new employees and make the ask in person
- All employees should be thanked for their contributions and updated on United Way throughout the year
- Try to identify an employee beneficiary if possible
- Attend an ECM training session

RUTHERFOORD

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Best Practices:

- During campaign, it should be clear to employees that helping the community goes beyond campaign
- Employees should be encouraged to participate in **United Way's annual Day of Action or other community service opportunities**
- Giving, advocating and volunteering go hand in hand, those who volunteer for a cause are likely to contribute financially as well

Around-the-Clock Shifts

Key Points

- Ensure that employees from all shifts are included in United Way campaign by having something special for each shift
- Recruit a committee of employees to serve as ambassadors at around-the-clock meetings
- Distribute pledge forms to each employee at the meeting and ask that they consider making a donation, but to please turn in the pledge form before leaving, even if they are unable to make a pledge
- Consider conducting a make-up campaign meeting for absent employees or those who may have been missed for other reasons



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Best Practices:

- Hold a 24 hour event, such as a hotdog sale to create awareness **and contribute to the campaign's success**
- Schedule for a campaign team member and United Way Development Associate to attend campaign meetings for all shifts
- Have a central location for information to be found and available to employees of all shifts



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Best Practices:

- Hold events for both day and night shift employees
- Provide food and drinks to all employees as a courtesy of the company
- Plan a sales event for employees and add proceeds to the United Way campaign
- Distribute pledge forms at meals and sales events and collect them at the end of each event

Retiree Campaigns

Key Points

- Having a retiree campaign prevents the loss of key donors as they retire and allows them to still feel connected to the company
- Companies can either appeal to retirees directly, or provide United Way with contact information for UW to appeal to them outside **of the company's campaign**
- Helps United Way of Roanoke Valley continue to remain in touch with retirees
- Retirees may have the time for community involvement and volunteering
- Collect contact information for retirees before they leave so you can include them in annual campaign
- Expand the retirement discussions beyond to include charitable giving to United Way and participation in the annual campaign



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Best Practices:

- Include retirees in department or corporate activities intended to support the United Way Annual Campaign
- Provide United Way with a mailing list of retired employees
- Compose a cover letter to introduce the retiree to the **company's campaign effort and lists key dates** where applicable
- Set a retiree goal and communicate results from previous year to retirees
- Explain that donations to the United Way Impact Fund generate a measurable result through the oversight of the Community Investment Process
- Thank retirees for their participation in advance



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Best Practices:

- Personalized letters are sent to each retiree still residing in the area
- Included with each letter is a pledge form, list of agencies, campaign brochures and self-addressed stamped return envelope
- Also included with each letter is a detailed, line-by-line instruction sheet developed for ease of use in completing the pledge form
- Letters emphasize the quarterly billing payment option with the minimum of \$25/quarter. This is usually an affordable amount for most retirees
- Letters are hand signed (no digital signatures) by both the ECM and a retiree representative who is supportive of United Way

Thanking Givers

Key Points

- The ECM, campaign team members or CEO should write a personal thank you note to all donors
- It is important to keep employees in the loop on campaign progress, thank them along the way and encourage them to help the company meet their goal
- Inform employees of final results; thank them for their contribution to maintain them as loyal donors
- Publicize the final results with posters or a newsletter
- Recognize campaign committee members for their extra efforts



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Best Practices:

- Thank all donors individually
- Donors at all levels receive a gift for their contributions



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Best Practices:

- Provide a luncheon for all donors
- Donors who attend the luncheon are eligible for additional prizes
- Entertainment can be provided by the CEO or President dressing up or performing for the staff



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Best Practices:

- All aspects of the campaign should be enjoyable to employees and donors
- Having a close out event, like a company picnic, shows thanks to donors for their time and compassion for the community

Frequently Asked Questions

Our Mission

United Way of Roanoke Valley improves lives by mobilizing the caring power of people in our community

Advancing the Common Good

United Way serves as a catalytic force for positive community-wide change, working with our donors, volunteers, partner agencies, and other key stakeholders to build strong and healthier region in the 21st century

Who runs United Way of Roanoke Valley?

Local volunteers lead and support every aspect of this community organization. The volunteer Board of Directors sets priority and overall direction for United Way of Roanoke Valley. Our volunteers are comprised of top community leaders, your neighbors, and caring people just like you. They serve as members of the Board of Directors, the Campaign Cabinet, and committees that direct areas such as marketing, fund distribution and agency certification.

Doesn't United Way just raise and distribute funds?

United Way of Roanoke Valley is much more than a fund-raising organization. United Way also plays a major role in identifying problems and finding solutions that build and strengthen our community. United Way convenes knowledgeable, caring people to study ways to better meet the most social pressing issues. The information is used to help determine where to invest contributions. United Way of Roanoke Valley also spearheads collaboration among its partner agencies to reduce costs, increase efficiency, and help eliminate waiting lists.

Why should I give to United Way?

With one gift to United Way of Roanoke Valley, you make possible a local network of human care services. In fact, your United Way touches almost one out of every three people in the Roanoke Valley. And no other charitable effort offers the opportunity to help with so many of our community's critical problems: problems like homelessness, youth development, and our ever-growing elderly population. There are almost 600,000 charities in the USA and 30,000 new ones being formed each year, so how do you know who's doing a good job? With your United Way as your partner, you can rest assured the programs that will receive your contribution have been held to the highest standards. Our volunteers visit, examine and evaluate programs to be sure donated funds are invested where they can do the most good.

Who decides where the money goes?

Over 100 business and community leaders representing all segments of our community offer their time and talents to help distribute funds donated to United Way. The team makes funding decisions based on the effectiveness of each program and the needs of the community.

Where does the money go?

Our volunteers work very hard to make sure that your donation goes to the programs and services that address the most pressing human needs of our community.

Where does the money come from?

Most of the donations to United Way of Roanoke Valley are collected during our annual campaigns. The annual campaign typically splits into the following: 11% from corporations and foundations; and 89% comes from employees and individuals. This means that individual pledges -- like your contribution -- are extremely important to the community and to the success of many human service programs.