



2022-2023 WORKPLACE CAMPAIGN GUIDE

#TheOCWay

Breaking Barriers and Improving Lives in Orange County





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YOUR WORKPLACE CAMPAIGN MAKES A DIFFERENCE

Whether you're at a small business, a major corporation, or another type of workplace, you can join the hundreds of local organizations that support Orange County United Way with workplace campaigns each year.

ORANGE COUNTY UNITED WAY'S WORKPLACE GIVING CAMPAIGNS ARE:

GOOD FOR YOUR EMPLOYEES

Workplace campaigns are a fun and convenient way for employees to have a significant impact on their community.

GOOD FOR YOUR COMPANY

Partnering with us is a clear statement that your organization is committed to improving lives in Orange County and reinforces your reputation as a good corporate citizen.

GOOD FOR YOUR COMMUNITY

The money raised stays here in OC, so you're addressing the critical social challenges through one strategic partnership.



HOW TO RUN A WORKPLACE CAMPAIGN

Each campaign is different and tailored to your organization's unique culture. Setting up and running a campaign is simple, and we can help you every step of the way.

Please contact your United Way Corporate Engagement Manager for assistance in planning and executing any of the ideas in this guide.

1

PREPARE

2

INSPIRE

3

ASK

4

THANK

ROADMAP FOR A SUCCESSFUL CAMPAIGN

Below is a snapshot of what your campaign planning process may entail. Please reach out to your United Way Corporate Engagement Manager for additional support and guidance throughout your campaign.

01

Meet with your United Way liaison to learn about our latest community impact and discuss your upcoming campaign strategy.

02

Determine campaign dates and map out potential events with support from your leadership team and United Way liaison.

03

Secure the visible personal support of your CEO or senior decision maker.

06

Develop strategies to engage your \$1K+ donors and senior management to join United Way affinity groups.

05

Set a fundraising goal that your company can rally behind. Work with United Way to determine your online donation portal.

04

Recruit a campaign team to help manage your campaign and distribute campaign messaging across each department or team.

07

Create a communications plan for distributing company-wide campaign messaging. (i.e., campaign teasers, launch day, mid-campaign, final push and thank you)

08

Host a kick-off event for all employees, using your planned messaging and promotional materials to launch the campaign.

09

Send the initial pledge request, followed by additional company-wide reminders to educate and ask employees to donate throughout the campaign.

12

Send a final reminder and direct "ask" to all employees, prior to the end of your campaign.

11

Meet regularly with your campaign team to check fundraising progress, discuss strategies, and address any concerns and questions.

10

Host fundraising and volunteer events, educational presentations, and other in-person and/or virtual opportunities to encourage employee engagement.

13

Share final campaign results with all employees.

14

Thank top-level management support, your campaign team, and those who donated or participated in events.

15

CELEBRATE YOUR RESULTS!

1

PREPARE

The more you prepare, the more success you will have in your campaign. It's important to know what you need to do before you begin and identify areas in which you can lean on United Way staff for support.

HOW TO GET STARTED



Get in touch with United Way. We're here to help!

The most effective Employee Campaign Managers (ECMs) work closely with United Way staff and are readily able to share information about our work in OC with their colleagues. We would love to get you up-to-speed on our key initiatives and community impact results and help you come up with fun and engaging ideas for your campaign.



Plan your campaign.

Determine start and end dates, map out any events and set your fundraising goals with the help of your leadership team and United Way representative.



Secure support from top-level management.

Meet with your senior leadership and confirm their support of the campaign. Map out any places where you'll need their specific involvement, such as having them send out an email to staff to encouragement supporting the campaign. Make sure they know about campaign dates and goals and be sure to ask about any corporate gifts or company matching programs for employee gifts.



Recruit your team.

Create a team large enough to help you manage your campaign. Ideally, campaign teams should include employees from a variety of levels and departments. This will help lighten your workload and increase participation across the organization!



Incorporate an appeal to join United Way affinity groups.

Learn about United Way's affinity groups (page 15). We have dedicated Development staff available to help brainstorm ideas for soliciting gifts of \$1,000 or more.



Set a campaign goal and achievement milestones.

Your colleagues will likely want something to strive for, so set a goal for them to reach! If you ran a campaign in previous years, look at the numbers and think about what you can achieve. Ask senior leaders if you can offer incentives to employees for hitting the goal, such as a paid day off or catered celebration lunch.



UNDERSTANDING YOUR ROLE AS ECM

As an ECM, your role is to lead, plan, coordinate, delegate and implement a successful United Way campaign to inspire your colleagues to give and improve lives in Orange County.

As the ECM, you will be:

- Developing a campaign timeline with your United Way representative
- Serving as the organization-wide leader of your campaign
- Coordinating the overall execution of the campaign plan
- Arranging all campaign meetings
- Monitoring and reporting campaign results in a timely and accurate manner
- Working with your campaign team to ensure everyone understands their roles
- Thanking all colleagues who become involved with the campaign
- Evaluating your campaign and making recommendations or plans for next year

RECRUITING YOUR CAMPAIGN TEAM

A team of campaign volunteers will not only make your job easier, but it will also increase the success of your campaign. The size of your team depends on the size of your organization. Below are our suggested roles and responsibilities but remember – you can adjust based on what will work best for your campaign.

Communications Coordinator

- Develops a campaign communications timeline
- Works with United Way representatives to develop talking points and plan for any speakers to attend any campaign events

Senior Executive Campaign Chair

- Provides executive-level support for the campaign
- Works to increase corporate gift or matching gifts
- Encourages C-suite and employees to give through the campaign

Volunteer Coordinator

- Works with United Way representative to identify and promote United Way volunteer opportunities that fit within the planning timeframe, budget and other company-specific parameters
- Coordinates logistics with United Way representative and serves as an on-site contact at volunteer events

SHARING ORANGE COUNTY UNITED WAY'S MISSION

The below PDF will be made available to you to reference our mission, key initiatives, challenges we're facing, and some success stories. [CLICK HERE TO DOWNLOAD >](#)

At Orange County United Way, we are committed to breaking barriers and improving lives for everyone in our community by ensuring our students succeed, our struggling families gain financial security, and our homeless neighbors find a place to call home.



DID YOU KNOW?

Each year, close to 3,000 local high school students don't graduate

1 in 3 OC households struggle to meet their most basic needs

Nearly 6,000 people are experiencing homelessness in OC



Through our United for Student Success™ initiative, we provide programs and services to ensure students from our underserved districts receive the support they need to stay on track in school, graduate high school on time, and are prepared for college, career, and life.

"My mentor, she's been through what I want to do, she's experienced, she's done it. I'm fortunate I can communicate with her when I have questions about college and even other stuff. It's been eye-opening and I'm forever grateful for the opportunity."

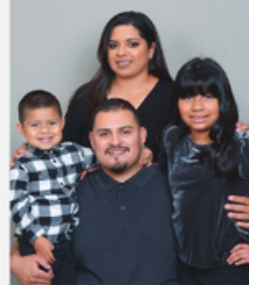
—Andres, Class of 2021 mentee



We are dedicated to providing programs and services that equip our residents with vital tools and resources that create pathways to economic stability. Through our United for Financial Security™ initiative, we are empowering Orange County families and individuals to transition from surviving to thriving.

"Once I started the SparkPoint OC program, my life changed. It helped me a lot and now we don't have to struggle like we used to."

—Jacquelyn, SparkPoint OC program beneficiary



We believe access to affordable and secure housing can be the foundation for a successful future, and is a critical component of family stability and community success. Through our United to End Homelessness™ initiative, we are working to ensure everyone in Orange County has a place to call home.

"It went wrong so quickly. But I feel good about myself now; I feel good about tomorrow. I can smile again."

—Stephanie, WelcomeHomeOC program beneficiary



Orange County United Way works alongside passionate volunteers and donors to ensure our residents have the support they need.

> 50+
programs in OC

> 712,960
people served last year



Read more stories in our latest Annual Report

Join us in caring for our community. That's The OC Way!

CAMPAIGN PLAN & TIMELINE

12
Weeks

- ☐ Plan your campaign with the help of your United Way representative. Determine start and end dates, map out any events and set your fundraising goals.
- ☐ Recruit additional campaign committee members.
- ☐ Look over notes from past campaigns or meet with previous ECM's to review challenges and successes.
- ☐ Brief senior executive leadership.

10
Weeks

- ☐ Finalize your organization's campaign committee.
- ☐ Begin regular United Way team meetings.

8
Weeks

- ☐ Finalize your United Way giving platform.
- ☐ Determine giving and receipt options for employee donations.
- ☐ Develop a campaign theme and calendar of events with United Way representative.

6
Weeks

- ☐ Develop a communications plan, making sure to check out United Way's campaign templates and resources.
- ☐ Coordinate with your United Way representative to have a story or presentation shared during your campaign.

4
Weeks

- ☐ Talk to your United Way representative about our latest work. Practice your presentation to colleagues so you are ready to tell United Way's story and answer any questions that may come up.
- ☐ Coordinate with your United Way representative to have a story or presentation shared during your campaign.

2
Weeks

- ☐ Host events for your top-level donors.



- ☐ Host kick-off event for all employees.
- ☐ Send initial pledge email and make sure you have a timeline to send reminders throughout the campaign.
- ☐ Continue educating employees, with help from the United Way team.
- ☐ Remind your team of your campaign goal and set check-ins to discuss updates throughout the campaign.

CAMPAIGN KICK-OFF

A campaign kick-off is a company-wide event or meeting to educate and inspire your colleagues about giving back to their community through United Way, with an element of fun. Every campaign kick-off is different. Your kick-off should be tailored to your organization and what best suits your needs.

Here are some things to consider when planning a campaign kick-off:

What is your budget?

You do not want to start planning an event only to realize it is not financially feasible. Talk with your senior executive leadership about plans and a budget first.

Are your colleagues interested?

A key factor in planning an event is to plan something fun and interesting for your coworkers. Garnering as much support and participation as possible is what will make your kick-off a success. Know their interests, think about what would work best for your organization's culture and work from there to plan something people will look forward to!

What can you do?

If you are at a large organization, think about how you can engage smaller sets of employees to keep them interested. If you are at a small workplace, maybe there is another organization you can team up with for a kick-off event. If you are running your campaign at your busiest time of year, a kick-off event outside of your busy workday or during a break might be the most practical. There are plenty of ways to have great kick-offs, large and small, but be aware of what is realistic.

A key part of your campaign is inspiring your colleagues to support United Way's work in our community. Below you will find ideas for how and when to share information about United Way with your team.

SHARE THE ENTHUSIASM



Volunteer Opportunities

Engaging employees in volunteer opportunities will allow them the opportunity to directly connect with United Way's work. If you are interested in setting up a volunteer opportunity for your organization, please contact your United Way representative.



Promotional Opportunities

We're here to help! United Way has materials available for you to promote your campaign, including:

- Posters and flyers
- Client testimonials and videos ([View on YouTube](#))
- Template email messages
- Informational materials about our work in specific areas
- Pop-up banners for decoration at events
- And more!



Custom Promotional Materials

Many organizations like to develop their own materials to promote their campaign. We think that's great! Talk to your United Way representative to brainstorm ideas and see where we can be helpful.



SHARING HOW DONATIONS MAKE A DIFFERENCE

Your impact is powerful. Every donation, big or small, helps make a difference for our OC neighbors in need. Use the examples below to inspire employees to support United Way's work in the community. Every little bit counts!

\$5 a week (72¢ a day)

you support **11 OC students** from high-needs school districts with an hour of tutoring*

\$10 a week (less than \$1.50 a day)

you offer college and career readiness opportunities for **4 underserved OC students***

\$25 a week (less than \$4 a day)

you provide **14 of our struggling neighbors** with one-on-one financial coaching to help them work toward self-sufficiency*

\$50 a week (less than \$7.25 a day)

you help **6 local Veterans experiencing homelessness** find a place to call home and receive support/case management to remain stably housed*

*Based on donating weekly for one year



THREE PHASES OF PROMOTION

BEFORE the campaign

- ☐ Share information about United Way's latest work. This can be done via email, during planning meetings, in the break room – anywhere!
- ☐ Thank last year's donors. It is important to acknowledge employees that have given in previous years. Be sure to appreciate them leading up to the campaign kick-off.
- ☐ Share a schedule of activities for the upcoming campaign. This schedule will generate excitement among employees and give your team an idea of what to expect.
- ☐ Share prior year results. By sharing last year's results and your campaign goal for this year, you are giving your colleagues something to work toward. If you would like help setting a goal, please speak with your United Way representative.
- ☐ Send a campaign preview email.
- ☐ Display United Way materials throughout the office.

DURING the campaign

- ☐ Send a campaign kick-off email from your organization's leadership.
- ☐ Share instructions for making a pledge.
- ☐ Send donation reminders.
- ☐ Invite speakers from United Way to campaign events. This will help employees have a better understanding of the work United Way does in the community.
- ☐ Inform employees about incentives or corporate matching gifts. If your senior leadership has matching programs or corporate gifts, it can encourage employees to give more.
- ☐ Offer volunteer opportunities to your employees. Volunteer opportunities will help employees feel connected to United Way's mission.

AFTER the campaign

- ☐ Highlight campaign results. Share your total raised and be sure to thank everyone who participated.
- ☐ Send a thank you email to donors.
- ☐ Send a "thank you" email to your campaign team.
- ☐ Thank donors for their contribution. Hosting a "thank you" event or giving out tokens of appreciation are two great ways to make people feel like their contribution was important. Your United Way representative can join to share community impact.



It is important to directly ask your colleagues to donate to United Way throughout your campaign. Your ask may come in multiple forms – in person, during events or through email. Here are a few tips you can use.

MAKING THE ASK



Talk to Your United Way Representative.

We are available to help you come up with the best strategy for making your ask.



Get Their Undivided Attention.

Schedule a time with your colleagues at a meeting or kick-off event and ask them to participate in your campaign with a donation. Make it social!



Tell the United Way Story.

Come prepared with reasons why people should give to United Way. If you would like to invite a United Way representative to tell the United Way story, please let us know and we can send a speaker.



Explain How to Give.

As the ECM, you can determine which giving platform will be used and it is your responsibility to tell people where and how they can donate. There are a couple of options to choose from. Keep in mind, if you work for a larger parent organization, your company may have already determined the giving platform to use. Check with your contacts at your parent organization to find out.



Address Concerns & Questions.

As the ECM, you can determine which giving platform will be used and it is your responsibility to tell people where and how they can donate. There are a couple of options to choose from. Keep in mind, if you work for a larger parent organization, your company may have already determined the giving platform to use. Check with your contacts at your parent organization to find out.



Be Direct!

It is easy to do all the things listed above and still forget to make a direct ask. Make sure you are clear and direct when asking your colleagues to give.

United Way representatives are available to help during the planning or execution of your campaign. We know it can be especially difficult to ask for donations and we are here to make that process as easy as possible. If you would like suggestions, tips or for a speaker to make “the ask,” please let us know.

AFFINITY GROUPS

United Way's affinity groups are a great way to encourage employees at your company to consider donating at a level that is right for them. Each group offers networking and volunteering opportunities.



President's Circle

Our most dedicated supporters, giving \$10K or more annually to fund our work in the community. They receive invitations to unique gatherings to hear about timely topics from subject matter experts in our community.



Alexis de Tocqueville Society

An elite group of 400+ philanthropists who contribute \$10K or more annually with \$3,500 or more invested in our community-based work



M.O.B. (Men of the Breakfast)

A powerful philanthropic group, providing members with special access to unique experiences while supporting our work to help our community's most vulnerable families transition from surviving to thriving.



Leaders United

Members contribute \$1K or more annually and are committed to inspiring others to join them in providing hope and opportunities to local individuals and families in need.



Women United

A diverse group of 350+ local women who actively engage in philanthropy, volunteerism, and advocacy throughout OC. Women United members can donate at two giving levels: Alexis de Tocqueville Society and Leaders United

4

THANK

Thanking those who participated is a critical part of your campaign. Not only will your colleagues feel appreciated for their contributions, but they will be more likely to support the campaign in the years ahead.



Thank Top-Level Management Support.

The most successful campaigns have strong buy-in from senior leadership. Thank your executive leaders for their support of the campaign. Be sure to highlight any effort on their part to secure corporate gifts or company matching programs.



Thank Your Campaign Team.

Your team will have helped your organization's campaign from start to finish. They were able to lighten your workload and increase the impact of your campaign. Be sure to thank them for their dedication and hard work.



Thank Those Who Donated or Participated in Events.

At United Way, we are extremely grateful for every gift, large or small. Be sure to acknowledge each employee that donated, advocated or volunteered during your company's campaign.



Give United Way a Chance to Say Thank You.

United Way sends regular communication to donors. We would love to stay connected to our donors at your organization! Share donor details so that we can thank your colleagues in thank you mailings and give them updated information about what we do throughout the year.



IMPORTANT NOTE: A corporation's pledge systems commonly do not release donor details (if approved by the donor) to a non-profit organization until 4 - 6 months after the donation has been made. Allowing us to obtain internal donor information earlier is crucial to timely and appreciative donor acknowledgement!



HYBRID CAMPAIGN

(In-Person and/or Virtual)

TACTICS & TOOLS TO CONSIDER

SOCIAL

Mini-Campaigns

Smaller and more directed campaigns are created throughout the year as needs arise and made available. These campaigns focus on a more subjective need with a tangible cost-value benefit that's easy for a company to set a goal around.

Happy Hour or Dinner with the CEO

Raffle off the opportunity to have a company-sponsored happy hour or dinner with the CEO. Everyone who pledges during the campaign is entered into the opportunity drawing. This encourages recurring gifts rather than one-time smaller donations.

Karaoke

Bring singing fun to your employees with karaoke! This is a great option for employee engagement and fundraising activity (Participation entry fee donated to Orange County United Way).

(Silent) Auction

An online or in-person auction allows the bidders to engage in friendly competition to claim the prize. It offers a wider reach for participation, flexible duration (7-10 days recommended), and allows donors to bid directly from the device of their choice.

Holiday Decorating Contest

Plan a Holiday theme and hold a pumpkin carving, gingerbread frosting, or office decorating contest. Find a local business willing to donate or have employees buy the required items for their families, their staff or to use in the contest. Employees enter individually or by group. Charge \$5 to enter and \$1 to vote. Award prizes in various categories. Examples:

- Most traditional
- Best effort by a group
- Most creative
- Best effort by an individual

INCENTIVE

Digital Gift Card with Redemption Code

Encourage participation in giving campaigns or activities with digital gift cards. Send a redemption code that the recipient can use to exchange for an item they pick in an online store (large selection of items from electronics to jewelry). Shipping is included, so the recipient just needs to pick something they like. You are charged only for the codes that do get redeemed, and there are different levels of gift cards available, from \$25, \$50, \$75, \$100, etc.

HYBRID CAMPAIGN TACTICS & TOOLS TO CONSIDER (continued)

GAMES

Bingo

Organize a fun Bingo game. Charge players a set amount to buy in (donated to the United Way Campaign) and create a coveted prize to give players the motivation to buy more cards in order to increase their chances of winning.

Trivia

Create your topics and questions, charge an entry fee for employees to participate, and encourage friendly competition for a top prize.

FOOD

Recipe Cook-Off Contest

Employees make their favorite recipe and enter it into a cook-off contest for an entry fee. A panel of "culinary experts" selects the Official Cook-Off Champion to win a top prize.

Potluck Luncheon

Participating employees bring a hot-dish, appetizer, salad, side, dessert, etc to be shared. Paper products are also need to this event. There is no sign-up for this event. Items brought are completely random. Employees pay \$5 to fill their plate and sample everything in the room.

International Food Day

Employees team up in groups to create tasty treats from around the world. Employees decorate their own booths/tables and dress in appropriate costumes. Hold the event over the lunch hour, allowing employees to purchase tickets redeemable for food at the booths. A panel of "celebrity" judges awards prizes.

FITNESS

Workout Classes

Set up break-time classes with professional fitness instructors and charge an entry fee for employees to participate and get moving.

Fitness Challenges

Promote a healthy competition between co-workers or other company departments. Stay healthy and active by walking, running, cycling, and other activities that are measured in distance to join virtual races.

IMPACT

Video Stories

Pick from an inventory of United Way success stories and community impact videos to use in your presentation and/or other methods of delivery.

Lunch & Learns

Educate your employees about the needs of our community or on a specific issue – like our Homelessness 101 – over lunch.

Philanthropy Platform (Salesforce Philanthropy Cloud, Benevity, YourCause)

Publish information about critical local issues, moving personal stories, fundraising and volunteer opportunities on philanthropic platforms on an ongoing basis.

Share Your Screen

If there are any company screens in your company's building, consider posting a campaign call to action for awareness.





FREQUENTLY ASKED QUESTIONS

HOW LONG SHOULD A WORKPLACE CAMPAIGN RUN?

The average campaign runs for one to two weeks, which is usually enough time to kick off your campaign, effectively promote United Way and make your ask without overwhelming you colleagues. An exception might be if you are the ECM at a very large or multi-site organization.

WHEN SHOULD OUR WORKPLACE CAMPAIGN TAKE PLACE?

Most campaigns run between August and November, but they may happen at any time that is best suited for your organization.

HOW CAN EMPLOYEES GIVE?

United Way offers several options. Please connect with your United Way representative to discuss what will work best for your organization.

WHEN DOES PAYROLL DEDUCTION START?

Payroll deduction typically runs from January 1 through December 31. However, United Way does not set your payroll schedule. It is a decision made within your organization. Communicating payroll deduction and donation payment timeline will be helpful to your employees.

HOW DO I WORK THIS INTO MY SCHEDULE?

The best way to run a campaign without being too overworked is to recruit a committee and delegate. Work with your United Way representative and let them know your limitations. This will allow you to come up with a plan that fits both your organization's needs and your busy calendar.

CAN MY COLLEAGUES DESIGNATE THEIR DONATION?

As a service to donors, we make it possible to designate your donation to a program or other 501(c)3 agency. However, the direct investment of your gift to United Way will make a profound impact on our community. Instead of addressing just one issue, we are working to address some of the biggest needs in our region. Your dollars given directly to United Way enable us to do research about important issues in our region while also working with organizations that are making a difference in these areas.

THANK YOU FOR SUPPORTING YOUR UNITED WAY!

We're here to provide you everything you need
to have a successful campaign.



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