



# *Employee* ENGAGEMENT GUIDE

Simple strategies to build a team of fundraisers, hand raisers, changemakers, and game changers



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United Way  
of Salt Lake

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# Thank You!



At United Way of Salt Lake, we want to change the world, starting in our own backyard. By committing to running a workplace campaign, *we know you do too.*

It takes planning, creativity, and dedication to organize and engage employees in workplace giving campaigns. But you, along with hundreds of other community-minded organizations, are much more than fundraisers. You are hand raisers, game changers, and changemakers. United Way of Salt Lake is not an organization that is working to solve one problem, one program at a time. **We are fighting to give every child, from every community the same chance to live their best life. We do this by building partnerships with dozens of organizations across the Wasatch Front that bring community resources together.**

You, as the organizers of the campaign, are the heart of making our work a success—and a successful campaign means that we are one step closer to solving some of the toughest challenges we face as a community: poverty, poor health, and lagging educational achievement.

We truly appreciate your willingness to provide your time and leadership to help improve our community. **We hope the information in this guide will give you the tools and guidance you need to to make your campaign easy and fun!**

**Thank you for being our partner and champion for change!**

Your Support Team at United Way of Salt Lake,



**Bill Crim**

*President and CEO*



**Jerilyn Stowe**

*Chief Marketing  
and Engagement Officer*



**Tim Harrison**

*Senior Director of  
Corporate Engagement*

# BEST PRACTICES



## SECURE TOP-LEVEL SUPPORT AND CORPORATE MATCH

**Endorsement from your CEO and company is vital to the overall success of your fundraising efforts.**

- Encourage CEO to show support at meetings and volunteer projects, and send communications to employees.
- Select senior executives to lead the campaign or serve in a leadership/supporting role on the planning committee.
- Consider a corporate match on employee dollars as a great way to incentivize a donor's pledge and truly show you appreciate his or her generosity.



## STRENGTHEN YOUR COMPANY BY CULTIVATING PHILANTHROPIC LEADERS

**UWSL donor network members are leaders in their organizations, leaders in our community, and leaders in generosity.**

- Plan a separate opportunity for key executives or management team to learn about giving at a leadership level.
- Arrange separate (and fun!) meetings or events with current and prospective donor network members (*Tocqueville Society, Women United, Leadership Circle, Young Leaders*) where UWSL can discuss networking opportunities, volunteerism, and other benefits of membership.



## CONDUCT A FUN AND EDUCATIONAL CAMPAIGN

***Don't do it alone!* Form a committee and make the campaign fun for employees by incorporating a theme and events.**

- Use incentives to help motivate employees to attend activities, increase their giving, and turn special event donations into payroll deductions/monthly pledges.
- Educate and inspire before asking: communicate the work of UWSL by organizing site visits to Community Schools and Neighborhood Centers, allow UWSL to present its work in employee meetings, and send stories of impact via email.
- ***Go paperless!*** Online, mobile friendly campaigns are quicker, easier, and can show instant results and impact.
- Promote United Way of Salt Lake through email, on social media, web pages, and around the office.



## THANK DONORS

**The two most important words to remember, and the ones people appreciate the most, are *THANK YOU*.**

- Share the details of who gave to the campaign so UWSL can thank individual donors for their generosity and report back to them on where their gift is invested and the impact it's making.
- ***Donors who gave \$1,000 or more are recognized in our Donor Networks.*** Help us engage them so they can learn about exciting events, networking opportunities, and rewarding volunteer opportunities offered to them.

### Thank donors through the campaign

- Post thank you posters around your workplace.
- Send thank you letters or e-cards from your CEO and campaign chairs.
- Host an event for donors who give at a certain level or who have been giving for a certain number of years.
- Give recognition to the planning committee/team for their hard work.

# BEST PRACTICES



## REVIEW AND WRAP UP

- Inform leadership team of results and publicize results in newsletters, emails, intranet sites
- Plan out year-round engagement with UWSL like donation drives, volunteer opportunities, and advocacy cause campaigns. **Consider signing up for Year of Action!**



## ENGAGE YEAR-ROUND

- **Develop a Plan** – Communicate back to employees about how their investments are making an impact. UWSL has videos, newsletter articles, stats, web banners and much more at [uw.org](http://uw.org) and on our blog at [blog.uw.org](http://blog.uw.org) to share with your team.
- **Advocate** – Stay informed and champion a cause through an advocacy cause campaign. Does your team care about early education, graduation rates, health, or financial stability? We always have a way to engage around an issue you may care about. Visit [uw.org/advocate](http://uw.org/advocate).
- **Volunteer** – Create a volunteer engagement plan to see your impact in action at [uw.org/volunteer](http://uw.org/volunteer). Consider providing paid *volunteer time off* (VTO) as a benefit for your people!

## GOAL SETTING WORKSHEET

Set a challenging, yet attainable goal. Be ambitious, but realistic!



### PREVIOUS YEAR'S TOTALS

Total Previous Employees . . . . .

Total Previous Corporate Gift . . . .

Total Previous Leadership Givers . . . . .

Percent Previous Participation . . . . .



### CURRENT GOALS

Employee Contribution + Special Events = \$ \_\_\_\_\_

Corporate match/gift = \$ \_\_\_\_\_

New Leadership Givers = \$ \_\_\_\_\_

New Donors \_\_\_\_\_ + Avg Gift \_\_\_\_\_ = \$ \_\_\_\_\_

**Total \$** \_\_\_\_\_

**Increase of** \_\_\_\_\_ %

# Strategies for a Successful Ask

## HOW TO ASK FOR A GIFT

### Get Donors' Undivided Attention

- Use a required all-staff meeting or incentivize attendance with food and prizes
- Explain the purpose
- Find out what they know about UWSL
- Identify your loyal donors and use them as champions

### Explain United Way of Salt Lake and why you support us

- Bring UWSL materials and be prepared to explain them. Provide flyers/brochures to each person, show a video, or give a presentation
- Share a personal story, success story, or UWSL facts

### Ask for a Gift

- With new donors, ask for a first time gift and offer an incentive for giving
- For annual donors, encourage or incentivize them to increase their gift—consider asking for a specific increase, such as \$1 more per week or per pay period, or a 10% increase
- Remember, you are not asking for yourself, you are asking on behalf of the 137,000 low-income children in our community UWSL reaches each year
- Offer incentives to pledge online through one of our interactive tools

### Answer Questions

- Know your materials and answer any questions honestly—never guess
- Use UWSL FAQ's (included in this guide) to help answer questions
- If you don't know the answer to a question, let the donor know you will find out and then follow up with your Corporate Engagement Advisor or Specialist.
- Recognize some donors have real concerns; people should feel good about their gift

### Say "Thank You" and Inform

- Regardless of what the donor decides, thank them for their time and consideration
- Be sure to follow up with communications about how their gift is making an impact in our community

# Campaign

## Timeline and Checklist

### PRE-CAMPAIGN



- Meet with previous campaign manager and committee members to discuss last year's successes and challenges
- Meet with corporate leadership to discuss campaign goals, incentives, and corporate support of the upcoming campaign
- Recruit a workplace giving campaign committee
- Identify and recruit ambassadors to be spokespeople during the campaign. Are there people currently involved in United Way of Salt Lake's work? Maybe a volunteer could share their story or experience?
- Plan a calendar of educational activities and campaign events
- Come up with a campaign theme
- Do you want to invite friends and family outside the workplace to join your campaign? Set up a fun and interactive peer-to-peer campaign and encourage employee to engage their social networks! (*think Ice-Bucket challenge or a 5K race!*)



- Do you need a custom branded website landing page to post all your campaign information? UWSL can create one for you and integrate several different donation tools
- Schedule site visits at our Community Schools and Neighborhood Centers; *there's no better way to see your donations in action!*

Set overall campaign goal

Set campaign timeline, *i.e. How long will the campaign run?*

Begin to plan a campaign closing celebration

Plan how to invite donors to join a United Way of Salt Lake Donor Network

Request additional campaign materials from United Way of Salt Lake—pledge forms, informational brochures, campaign posters, videos, stories, online pledging tools



- Is your Campaign kick-off event planned? Will you provide lunch or other incentives to encourage attendance?
- Create buzz about the campaign. Post information on company intranet sites, in newsletters, or hang up posters
- Ask someone from your executive team (CEOs are perfect!) to send an all-staff email announcing the upcoming campaign and create some excitement by announcing prizes, contests, and events.

### CAMPAIGN DURATION: 1 WEEK TO 1 MONTH

- Hold an employee campaign kickoff event! Announce corporate goals and incentives for participation
- Hold your fun events, including BBQs, games, contests, and more.
- Deploy Ambassadors to staff meetings or break rooms to talk with staff about United Way of Salt Lake and giving
- Provide employees with pledge materials. If you have an online pledge platform, email the link to employees with a message from the CEO asking for employee participation and announcing corporate goals
- Share daily updates with staff and incorporate inspirational stories from employees and United Way of Salt Lake

### POST-CAMPAIGN DURATION: 1 TO 2 WEEKS

- Hold a closing campaign celebration to announce your success!
- Send appreciation letters to committee, ambassadors, and other volunteers
- Thank donors who supported the campaign
- Connect with and send campaign results to United Way of Salt Lake
- Hold a debrief meeting to discuss campaign outcomes, successes, and challenges in preparation for future campaigns
- Sign up for Year of Action volunteer events and plan other opportunities to show employees the impact of their gifts throughout the year

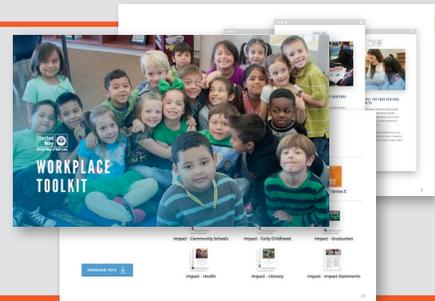
# SPECIAL EVENT *and* THEME IDEAS

While the emphasis of your campaign should be on engagement, education, and giving, many companies incorporate extra events into their campaign to increase participation and excitement. **Remember: *pledge first, play later*—special events should complement your campaign, not replace it.**



## Use the UWSL Workplace Toolkit

To help make planning your campaign easy, fun and meaningful—UWSL has created a “Workplace Toolkit” filled with helpful email samples, posters, flyers, social media graphics *and more!*



Visit [uw.org/workplacetoolkit](http://uw.org/workplacetoolkit) to download the complete toolkit or individual assets.

### Incentive Ideas:

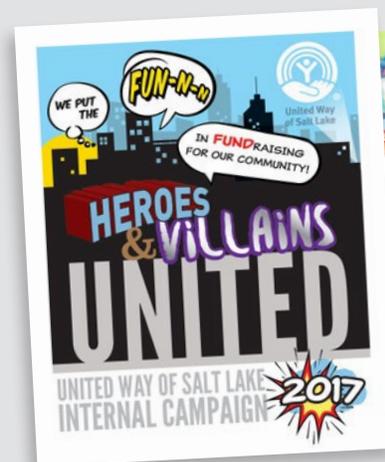
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|---|--|
| Coupons or gift certificates                  | Mugs, t-shirts, key chains, etc.       |
| Dinner, lunch or a round of golf with the CEO | Prime parking spaces                   |
| Dress down days                               | PTO-hour, half or full day             |
| Movie or sports tickets                       | Sleep-in-late or leave-work-early days |

### Special Event Ideas:

- |                              |  |
|------------------------------|--|
| Auction/garage sale          | Ice cream social                                   |
| Baby/pet picture match game  | Pancake breakfast                                  |
| Bake sale                    | Pizza party  |
| Bike race, fun run/walk      | Prize drawing                                      |
| Bingo                        | Pumpkin carving or decorating activity             |
| Bowl-a-thon                  | Remote control car races                           |
| Carnival                     | Softball tournament                                |
| Car wash                     | Tug-of-war   |
| Company cookbook             | Ugly tie, sweater, prom dress, or earrings contest |
| Chili cook-off               |  |
| Dunk tank                    |  |
| Employee funniest home video |  |

### Campaign Theme Ideas:

- Broadway/Hollywood/Movies
- Carnival/Mardi Gras
- Decades/History
- Hawaiian/Beach/Exotic Locales
- James Bond/Detective
- Music
- Olympics
- Pirates/Cowboys
- Sports/Local Teams
- ▼ *Superheroes*



# VOLUNTEER

**Meaningful community solutions require more than money, programs, or policies.** The kind of real and lasting change that benefits everyone is only possible when people from all walks of life are willing to roll up their sleeves and go where their time and talent is most needed. United Way of Salt Lake's Volunteer Program can connect employees year-round. We need volunteers who will:

- Serve as mentors, tutors, or readers in our Community Schools and Neighborhood Centers
- Participate in one-day service projects throughout the year that benefit low-income kids at Community Schools
- Host donation drives for books (February), school supplies (July), hygiene items (May), or winter gear (November)
- Participate in service opportunities identified by our Community School Directors that support academic success and parent and student engagement

Encourage employees to use their volunteer time off, to help us make a lasting impact for the kids and families in our community. By serving for as little as one hour once a week as a mentor or tutor you can provide a student the support that can build their confidence and help them learn the skills to be successful.

If these options aren't a good fit for you contact us and see what needs are existing in the neighborhoods we serve. Often there are meaningful opportunities that support students and families that go unfilled.

Please contact us before you schedule a meeting, team building day, or retreat to find out what upcoming opportunities are available and connect your event to a volunteer opportunity that needs you!

Together, we can connect volunteers to the opportunities that will have the greatest impact in the communities we serve.

**Contact your Advisor for more details and to get involved.**



**THE EASIEST WAY TO GET INVOLVED IS TO COMMIT TO A YEAR OF ACTION AND PARTICIPATE IN THE FOLLOWING VOLUNTEER EVENTS THROUGHOUT THE YEAR:**

#### **MAR Dr. Seuss Day**

Help students and teachers celebrate Dr. Seuss's birthday by reading in classrooms and leading literacy activities!

#### **APR National Volunteer Week**

*Service Unites*, the theme for *National Volunteer Week*, captures the power of changemakers to come together to build stronger, more vibrant communities through service. Volunteers of all ages can participate and support our community through online and in-person opportunities!

#### **JUN Day of Action**

Join United Ways across the country as we kick off summer with volunteer projects that support summer learning, healthy kids, and strong families.

#### **AUG Stuff the Bus**

Host a school supply drive throughout the summer and then join us to fill backpacks of essential school supplies for low-income and refugee students.

#### **SEPT Day of Caring**

Groups big and small can connect with projects in Davis, Salt Lake, Summit, and Tooele county that include beautification, cleanup, school projects, and client interaction and support.

#### **OCT Volunteer Action Network Week**

Every volunteer makes a difference so join our network of volunteers who are committed to creating lasting change. Opportunities to volunteer will be available online and in person so volunteers can choose how to support our community in ways that are meaningful.

#### **DEC Season of Service**

Help make the holidays bright and the winter warm for kids and families in need. Volunteer and donation opportunities will be available Nov-Dec but volunteers of all ages can come together on *Season of Service Week* by donating, volunteering, or committing to volunteer throughout the year!

# FAQ's

## What does United Way of Salt Lake do?

United Way of Salt Lake (UWSL) fights for every person in our community. We fight to ensure students graduate from high school, individuals have access to quality healthcare, and kids and families have the financial stability needed to be successful in school and in life. We do this by assessing community conditions, investing in focused collective impact goals, bringing together partners, and measuring results to create long-lasting results on a community-wide level. We are working together to solve the most difficult problems we face as a community.

## How can I be sure my contribution is well managed and well spent?

UWSL is dedicated to being transparent and accountable in all that we do. Recently, *Charity Navigator* and *Better Business Bureau* evaluated United Way of Salt Lake on our transparency and accountability. Overall, *Charity Navigator* gave UWSL a rating of 100 out of 100—a 4-star rating for exceptional transparency and accountability—exceeding industry standards. *Better Business Bureau* concluded that United Way of Salt Lake meets all 20 standards for charity accountability, making UWSL a *Better Business Bureau Accredited Charity*. More information, including all our financial documents, are available online at: [uw.org/financials-and-policies/](http://uw.org/financials-and-policies/)

## How much of my contribution goes to helping the community?

Currently, United Way of Salt Lake does not deduct any fees from individual donor contributions. The organization's costs of doing business are currently covered by our *2016/2017 Cornerstone Partners*, which are generous and committed corporations and foundations, that direct an annual investment toward underwriting those costs. We will continue to seek additional corporations and foundations to participate in this program, and encourage existing partners to increase their current level of support. However, securing corporate and foundation grants to solely cover operating expenses is becoming increasingly difficult. It could be that at some point United Way of Salt Lake's Cornerstone Partners will not cover 100% of the costs of doing business.

## What financial safeguards are in place at United Way?

UWSL is committed to the highest standards of accountability and transparency when investing donor dollars. Among other controls, as a matter of practice, no single staff member is able to process any transaction from start to finish, and all checks must be signed by two authorized signers. The Finance Committee and Board of Directors review financial statements quarterly to ensure adherence to the budget. An independent accounting firm audits UWSL once a year and the Audit Committee and Board of Directors must review and approve each audit.

## Why should I give to United Way and not directly to an agency?

No other single organization has the scope, expertise, or influence to bring thousands of partners and volunteers, from all sectors, around the common vision of achieving long lasting results for a stronger, healthier community. When you give to a specific charity, you support only an individual cause. When you give to UWSL, your gift becomes part of the collective effort to strengthen our entire community. Your gift to UWSL allows you to accomplish more than you could alone, or through a single charity.

## Why isn't my favorite nonprofit funded by United Way?

In some cases, an agency maybe doing great work, but it may not have programs that align with the collective impact goals of United Way and its partners. In other cases, the agency may not meet United Way's rigorous criteria for performance and accountability.

# FAQ's

## How does United Way pay for its events?

Annual events, such as Day of Caring, create a space for thousands of volunteers to get engaged in their community. All of the cost for these events, including all our advertisements are underwritten by generous sponsors. United Way of Salt Lake's corporate partners help to offset many operational costs such as campaign materials, events, and administrative fees.

## Is my gift tax-deductible?

**Yes**, UWSL is a federally registered 501(c)(3) not-for-profit corporation. Donations to United Way are tax-deductible to the extent allowed by an individual's or corporation's circumstances.

## Will the money I give to United Way go outside the community?

**No**. The money raised in our service area of Salt Lake, Davis, Summit, and Tooele counties, stays here, unless you, as the donor, request that it be sent elsewhere. Your local United Way does pay annual dues to United Way Worldwide, the trade association for United Ways. Those dues, which amounts to less than one cent of every dollar given, represent the only money that leaves our service area—and those dollars are eventually returned to the community in services received.

## Are there other ways I can contribute to United Way?

**YES! Please join us and GIVE, ADVOCATE, and VOLUNTEER.** Whether it's investing a portion of your budget in philanthropy, emailing your legislator about prioritizing access to education, or mentoring a young high school student toward graduation, there are countless options available to you every day. Use your skills and passion and be a hand raiser, a change maker, and partner in real community change that lasts.