



# EMPLOYEE ENGAGEMENT GUIDE

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

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 PROMISE  
PARTNERSHIP

 2.1.1

 United Way of Salt Lake

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United Way of Salt Lake

# Welcome & Thank You!



At United Way of Salt Lake, we want to change the world, starting in our own backyard. Your commitment to running a workplace campaign tells us that you do, too.

It takes planning, creativity, and dedication to organize and engage employees in workplace giving campaigns. But you and 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 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 organizations across the Wasatch Front to unite community resources and magnify our impact.

**As the organizer of a campaign, you are key to making our work a success—** 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 achievement in education.

We truly appreciate the time and leadership you're providing to help improve our community. We hope the information in this guide will give you the tools you need to make your campaign easy, fun, and successful.



**Meet the team here, and thank you for being  
our partner and champion for change!**



**Bill Crim**

President and CEO



**Peter Moes**

Chief Development  
Officer



**Adrienne Smith**

Senior Director of Corporate  
and Foundation Relations



## SECURE TOP-LEVEL SUPPORT AND A CORPORATE MATCH

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

- Encourage your CEO to communicate with employees and show support at meetings and volunteer projects.
- Select senior executives to lead the campaign or serve on the planning committee.
- Incentivize donations by offering a corporate match; this increases the impact of each pledge and shows the donors their generosity is appreciated.



## CONDUCT A FUN AND EDUCATIONAL CAMPAIGN

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

- Use incentives to help motivate employees to attend activities, increase their giving, and commit to payroll deductions or monthly pledges.
- Educate and inspire before asking: encourage co-workers to visit [uw.org/blog](http://uw.org/blog) for inspirational stories examples of the work UWSL is doing, invite UWSL to present its work in an employee meeting or at a kick-off event (digital or in-person), and share the impact donations have by emailing success stories from the community.
- **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.
- If there are existing UWSL supporters in your organization, plan get togethers for them to discuss networking opportunities and volunteerism.



## THANK DONORS

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

- Share the details (name, email, etc.) 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 give \$1,000 or more are recognized as Leadership Donors.** Help us engage with them so they can learn about upcoming events, networking opportunities, and chances to volunteer. .

### 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.



## REVIEW AND WRAP UP

- Inform leadership team of results and publicize results in newsletters, emails, intranet sites.
- Plan for year-round engagement with UWSL. Explore donation drives, volunteer opportunities, and advocacy cause campaigns. **Consider signing up for Day of Caring and other volunteer opportunities throughout the year!**



## ENGAGE YEAR-ROUND

- **Develop a Plan** – Communicate to your employees how their investments are making an impact. UWSL has stats, stories and more at [uw.org](http://uw.org) and [uw.org/blog](http://uw.org/blog).
- **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 ways to get involved with issues you 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

## WORKPLACE TOOLKIT

Build excitement by setting campaign goals like total dollars raised, number or percentage of employees who participate, volunteer sign ups... the possibilities are endless! The only requirement is choosing something that's meaningful to your team. And remember, a little competition never hurts; if it makes sense in your organization, you can set department or team goals and milestones throughout the campaign.

### GLOSSARY OF TERMS:

**Special Events:** Campaign events such as raffles, golf tournaments, silent auctions, bake sales etc. The funds raised are not tied to specific employees and are reported as event totals.

**Leadership Givers:** Donors that pledge/give \$1,500+ annually.

**Corporate Gifts:** Funds provided on behalf of the whole company to support United Way of Salt Lake's work. Most often appear as a match to employee gifts.

## 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

## WORKPLACE TOOLKIT

### 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
- Identify your loyal donors and use them as champions

#### Explain United Way of Salt Lake and Why You Support Us

- Utilize materials provided in our online Workplace Toolkit to share information about UWSL and the work we do
- 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 more than 200,000 low-income children in our community that 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 Coordinator
- 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

## WORKPLACE TOOLKIT

### 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 employees 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
- 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.

### VIRTUAL CAMPAIGN DURATION: 1 TO 2 WEEKS

- Hold an employee campaign kickoff event! Announce corporate goals and incentives for participation
- Hold fun events; they can be virtual, online, or hybrid and can include things like a BBQ, games, contests, and more
- Deploy Ambassadors to staff meetings to talk with staff about United Way of Salt Lake and the giving campaign
- 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
- Collect 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

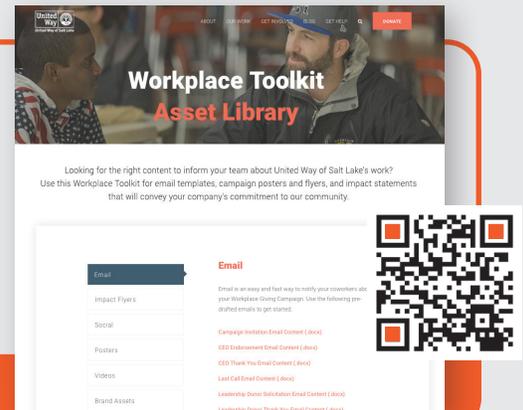
# Special Events and Theme Ideas

## WORKPLACE TOOLKIT

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 your campaign easy, fun, and meaningful, UWSL has created a “Workplace Toolkit” filled with email templates, flyers, posters, social media graphics, and more!



Visit [uw.org/campaign-toolkit](http://uw.org/campaign-toolkit) to download toolkit assets.

#### Incentive Ideas:

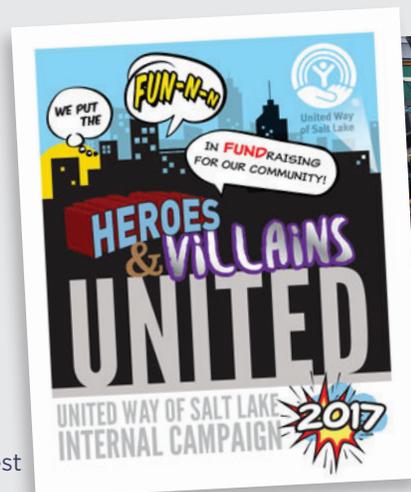
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| Coupons or gift certificates                   | Company or campaign mugs, t-shirts, key chains, etc. |
| Lunch, dinner, or a round of golf with the CEO | Prime parking spaces for a day, week, or month       |
| Casual Tuesday (dress down days)               | PTO-hour, half-day, or full-day                      |
| Movie or event tickets                         | Start late or leave 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                        |
| Bowl-a-thon                  | Remote control car races                             |
| Carnival                     | Scavenger Hunt                                       |
| Chili cook-off               | Softball tournament                                  |
| Cookie decorating            | Trivia/Jeopardy                                      |
| Dunk tank                    | Tug-of-war   |
| Employee funniest home video | Ugly tie, sweater, prom dress or accessories contest |

#### Campaign Theme Ideas:

- Beach (*Wave Goodbye to Inequity*)
- Broadway/Hollywood (*Glamour Does Good for Our Community*)
- Decades (70's, 80's, 90's—*Serving the Community is Timeless*)
- Fair Theme (Step Right Up and Make a Difference)
- James Bond/Detective (*Seeking Answers to Inequity*)
- Olympics (*Gold Medal Champions in Service/Donations*)
- Sports/Local Teams (*Compassion for the WIN!*)
- ▼ **Superheroes (Heroes and Villains UNITED)**



**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 Collective Impact Team that support academic success and parent and student engagement

Encourage employees to use their volunteer time off to help UWSL make a lasting impact for the kids and families in our community. By serving as a mentor or tutor for as little as one hour a week, you can provide a student with 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 exist in the neighborhoods we serve. Often meaningful opportunities that support students and families 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 Corporate Engagement Coordinator for more details and to get involved.



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

### **YEAR-ROUND OPPORTUNITIES**

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.

#### **MAR Read Across America Day**

Help students and teachers celebrate the love of reading by volunteering in classrooms and leading literacy activities!

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

Host a school supply drive throughout the summer and then join us to fill backpacks with 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 counties that include beautification, cleanup, school projects, and client interaction and support.

#### **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!

## What does United Way of Salt Lake do?

United Way of Salt Lake envisions an inclusive community where all people can achieve their potential through access to education, financial stability, and healthy lives. We build powerful partnerships that achieve lasting change. We work with committed partners, volunteers, investors, individuals, and donors to change the world—starting in our local communities that need it most. We are fighting to make sure that every child, and every family, in our community can be successful.

## 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?

In 2011, United Way of Salt Lake stopped being a transactional fundraiser and pass-through organization. When you give to UWSL you are giving to support the core programs of 211, which helps people in crisis, and the Promise Partnership, which works to help every child in our region achieve their full potential by improving education, health, and economic mobility outcomes. As with a gift to any other well-run nonprofit, 100% is going to help the community: the majority supporting the programmatic work of the organization (70%) and the remainder (30%) supporting the operations, allowing us to effectively manage those programs, carefully steward donations, and achieve the results you are investing in.

- We encourage donors to evaluate the impact of their giving and the use of funds based on transparent reporting available online: <https://uw.org/financials-and-policies/>
- We also encourage donors to learn more about philanthropic impact; one place to start is with this TED Talk by Dan Pallotta, “The Way We Think About Charity is Dead Wrong” [https://www.ted.com/talks/dan\\_pallotta\\_the\\_way\\_we\\_think\\_about\\_charity\\_is\\_dead\\_wrong/transcript?language=en](https://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong/transcript?language=en)

## 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 together 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 may be 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.

## 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 costs 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 amount 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 changemaker, and partner in real community change that lasts. [uw.org](http://uw.org)