

# Workplace Campaign Toolkit

## 5 Simple Steps to Hosting an Orrville Area United Way Workplace Campaign



## Orrville Area United Way

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# **About Orrville Area United Way**

## **OUR Mission**

Orrville Area United Way engages the caring power of our community to foster a thriving society.

## **OUR Values**

**We believe in the inherent worth and dignity of each person**

Education – helping children and youth achieve their potential.

Income – promoting financial stability and independence.

Health – improving people's health and promoting wellness.

## **OUR Focus/Impact Areas**

### **Nurturing Children and Youth**

Partnering with programs that provide children and youth the tools to be successful in life.

### **Developing Life Skills**

Partnering with programs that help individuals and families build essential skills to manage the demands and challenges of everyday life.

### **Helping in Hard Times**

Partnering with programs that provide emergency assistance to help individuals and families overcome barriers during a time of difficulty or hardship.

### **Promoting Health and Wellness**

Partnering with programs that help individuals and families achieve emotional, social, physical, and mental well-being through accessible preventative and/or curative health and wellness services.

## **Welcome, and Thank You for your interest in hosting an Orrville Area United Way Workplace campaign!**

By agreeing to lead the OAUW campaign in your workplace, you will be an integral part of the success of the campaign. Your commitment and dedication matter to our CommUNITY.

**Over 10,000 individuals, children, and families are served in Dalton, Marshallville, and Orrville through community investments. Our United Way is supported by over 1,900 individual donors.**

### **What is a workplace campaign?**

The OAUW campaign unites employees in all departments of a company, and gives them an opportunity to donate, volunteer and advocate for programs that are serving their community. They can see and be part of meeting needs and improving lives in the community they work and/or live in.

The workforce campaign is about more than raising money for worthy causes. It also strengthens connections between employees and their community.

### **How does the workplace campaign work?**

Workplace giving is an easy and effective way to help employees make a difference and show them that their workplace is actively supporting the local community's most pressing needs. Employees of a company are given an opportunity to support OAUW by donating a portion of their paycheck. In many cases, the donations from employees are pre-tax pay, and many companies match their employees' donations, which makes their charitable contributions go further. Whether you're a small business, major corporation, or even a nonprofit, you can join the thousands of local businesses and organizations that run workplace campaigns each year.

### **How do you start a workplace campaign?**

Orrville Area United Way will partner with you to develop a customized workplace campaign that aligns with your corporate values, as well as the interests of your employees. We provide guidance and support to assist you in building your fundraising team and running an effective campaign. We are happy to send a volunteer to your staff meeting to share information about OAUW.



## **Five Simple Steps to a Successful Campaign**

### **1. Secure top management support.**

The support of top management is essential to a successful campaign. Keep them informed and involved by asking them to:

- Approve your campaign goals & objectives.
- Approve time for an informative group meeting if permitted.
- Send a personal letter or email to employees endorsing the campaign and encouraging support for the campaign.
- Talk briefly about endorsing the campaign during group meetings.
- Send a 'thank you' to contributors and volunteers.

### **2. Recruit and train a campaign team.**

Don't try to do it all alone! A campaign team is an excellent way to spread enthusiasm and the workload and help ensure your company has a successful campaign. Think about inviting representatives from all areas of your organization to your team.

- Utilize the talents of your team members and help assign specific duties that match their passions and talents.
- Hold an orientation session to review and discuss campaign literature, solicitation techniques, pledge forms, options for giving, and FAQs.
- Establish a timetable and communicate progress with your team members.
- Orrville Area United Way staff are happy to attend your training sessions.

### **3. Develop a campaign plan.**

- Discuss campaign strategies that fit within your company culture.
- Determine the means of pledging best suited to your company: pre-printed pledge forms, one-part pledge forms, or digital pledge forms. Work with OAUW to arrange for the delivery of your campaign materials.
- Determine the campaign timeline, including the pledging timeframe, and any presentations and activities that will be taking place.
- Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, special events, securing incentives, etc.
- Evaluate past results and identify areas where potential for growth may exist, such as dollars raised and participation. Go for the Gold and set a campaign goal that includes these areas.
- OAUW staff are available to attend your campaign planning meetings to answer questions and offer ideas.

### **4. Implement the Campaign Plan.**

#### **Promote the Campaign**

- Place information (posters, flyers, thermometers, etc.) in high traffic areas around your office, such as entry ways and break rooms, so employees have an opportunity to learn more about Orrville Area United Way.
- Use multiple methods of communication to inform people about the campaign: email, staff meetings, payroll stuffers, etc.

## **Implement the Campaign Plan Continued.**

### **Hold the Campaign Kickoff**

- Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, timeframe, activities, and incentives.
- Invite a member from your organization's management team to the general kickoff meeting(s) to communicate management support of the campaign.
- Invite an OAUW representative to speak at the meeting(s).

### **Make the Ask**

- Make sure everyone is given the opportunity to make a contribution to the campaign. The number one reason people say they didn't give is because they weren't asked!
- Personally distribute and collect pledge forms.
- Be prepared to answer questions about Orrville Area United Way. If needed, OAUW can provide a list of FAQs.
- Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference.
- Ensure that every employee is asked to participate but remember that giving is a personal choice and no one should feel pressured to give.

**In addition to the campaign materials, directing employees to our social media pages and [www.orrvilleareaunitedway.org](http://www.orrvilleareaunitedway.org) is a great way to see the work Orrville Area United Way is doing in the CommUNITY.**

### **Monitor and Report Progress**

- Send out reminders to encourage people to turn in their pledges.
- Keep a running total of dollars raised as pledges are collected and provide regular updates to employees through email or thermometers.

## **Implement the Campaign Plan Continued.**

### **Wrap-Up the Campaign**

- Ensure all pledges are turned in. Collect payment from those who opted to make a one-time gift with a check or cash.
- Complete the OAUW Campaign Report form included in your folder.
- Schedule a drop off or pick up of your campaign envelope and extra campaign supplies.
- Report your final campaign results to employees and leadership.
- Thank everyone! Send thank you emails, write notes, hang a thank you poster! It is only through the generosity of each and every contribution that we make such significant change in our CommUNITY!
- Hold a final campaign committee meeting to evaluate your efforts and make recommendations for next year.

### **5. Maintain year-round communications.**

Implementing a year-round communications plan will allow you to keep employees updated and interested in Orrville Area United Way. Continue to share success stories, volunteer opportunities, newspaper articles of the programs supported by OAUW dollars, community campaign results, and OAUW Quarterly Impact Recaps.



## **Solicitation Techniques...**

### **Employee Meeting(s)**

Employees are invited to participate in a presentation given by an OAUW representative to learn the direct impact their investment in Orrville Area United Way makes in our CommUNITY.

### **Advantages:**

- Better understanding of community issues.
- Efficient use of time.
- Uniform message.
- Accommodates the work schedule of the organization.

### **Sample United Way Meeting & Agenda:**

- 2-3 weeks before the meeting, send an invitation to all employees stating the purpose of the meeting.
- Distribute pledge forms and brochures at the beginning of the meeting.  
The Employee Campaign Manager provides opening remarks.
- Company leadership provides a statement of corporate support and encourages participation.
- An OAUW representative presents Orrville Area United Way's mission, values, focus, commitment to accountability, and why giving to Orrville Area United Way ensures maximum impact in our community.
- Encourage the audience to take an active role in making our community a better place to live and work by supporting Orrville Area United Way.
- Describe incentives.
- Encourage payroll deduction.
- Thank everyone for taking the time to attend and for being invested in their community.
- Meetings should be tailored to your time frame and space availability.



## **Personal Ask**

Involves one employee personally asking another for their contribution.

### **Advantages:**

- Campaign volunteers have an opportunity to personally share why they support Orrville Area United Way.
- Contributors can have questions answered immediately.
- Conversations can lead to discovering new or expanded ways that employee values and company values align.

## **New Hires**

Establish a New Hires program to invite employees hired after the campaign period to give and inform them of your organization's support of OAUW. Your OAUW representative can help you set up a New Hires program and review the materials available.

## **Retirees**

Engaging retirees as part of the employee campaign helps broaden the base of support for the campaign and offers retirees the opportunity for continued involvement.

## **Leaders in Giving**

Leaders in Giving are individuals who give at a leadership level and are recognized in special ways:

**Gold Level: \$1,500 or more**

**Silver Level: \$1,125 to \$1,499**

**Bronze Level: \$750 to \$1,124**

**OAUW is proud to recognize the support of our Leaders in Giving by listing their names on our Leaders in Giving Wall.**

### **Advantages:**

- Gaining Leaders in Giving members is an effective and efficient way to build your campaign.
- Leaders in Giving help motivate and strengthen your campaign through their support, leadership, and generosity.

### **How to Implement:**

Host a Leaders in Giving 'Lunch & Learn' to help recruit new Leaders in Giving and aid in the retention and elevation of current givers. An OAUW representative will be happy to provide information and support.

## Sample Letters

The following are sample letters for use during your employee campaign. Use the letters as they are, or as models to develop a message that reflects your organization's personal style.

### Endorsement Letter (1)

At <company name> we've earned a reputation for caring about our community. Soon you'll have the opportunity to show how much you care by supporting the annual Orrville Area United Way campaign.

This is your chance to make our community better and change thousands of lives right here in eastern Wayne County. With one gift to the Orrville Area United Way, you will impact the lives of over 10,000 individuals and families in the Dalton, Marshallville, and Orrville area. Your investment in Orrville Area United Way improves lives and strengthens our community.

Please join me in supporting this year's effort by contributing as generously as you are able. It is all of us giving together that makes this community stronger.

### Endorsement Letter (2)

At <company name> we have always prided ourselves on our leadership and dedication to our community. Orrville Area United Way is committed to focusing on the most critical needs in the Dalton, Marshallville, and Orrville area. Investing in Orrville Area United Way improves lives and strengthens our community.

That is why our company actively supports the annual Orrville Area United Way campaign. As we begin the 2024 campaign, your continued support and generosity are appreciated. Your leadership and commitment inspire the generosity of others.

As you consider your investment in Orrville Area United Way, I encourage you give thought to <continuing to give at or giving at> the Leaders in Giving level.

It is donors like you, and all of us giving together, who make this community stronger.

## Thank You for Giving Letter

Thank you for participating in this year's annual Orrville Area United Way campaign. In 2023, our employees raised <\$>, which will help make an impact on the most critical needs facing our community. Investing in Orrville Area United Way improves lives and strengthens our community, and we appreciate your ongoing commitment. You can be truly proud of the impact your gift makes in our community! Thank you!



**THANK YOU**  
**FOR BEING INVOLVED.**  
**LIVING UNITED.**  
**CHANGING LIVES.**



Orrville Area United Way

**SERVING EASTERN WAYNE COUNTY**

**The Orrville Area United Way  
Campaign runs mid-August  
through November 1!**

## **Campaign Checklist:**

### **Before the Campaign**

- ✓ Meet with your OAUW representative.
- ✓ Attend one of the Campaign Coordinator Trainings in June/July.
- ✓ Secure Management support.
- ✓ Review your campaign history and set your goals.
- ✓ Recruit a campaign committee to help with the campaign.
- ✓ Determine your campaign plan, timeframe, and any incentives.
- ✓ Gather your campaign communications and materials.
- ✓ Schedule your kick-off, OAUW speaker, and any special events.
- ✓ Promote the campaign with an announcement.

### **During the Campaign**

- ✓ Distribute pledge forms and campaign materials to every employee.
- ✓ Promote the campaign through numerous channels.
- ✓ Hold a mid-campaign committee meeting to review the progress towards the goal.
- ✓ Send progress reports to employees, and reminders about campaign events, incentives, and deadlines.

### **After the Campaign**

- ✓ Collect all pledge forms and campaign material.
- ✓ Schedule a time to turn in completed paperwork to OAUW.
- ✓ Take care of any corporate contributions or matches on employee giving.
- ✓ Send a thank you letter to everyone!
- ✓ Publish a short story, photo, and the results of your campaign in the company newsletter.
- ✓ Hold a post campaign committee meeting to evaluate the challenges and successes of the campaign. Keep the notes handy for next year!
- ✓ Tell your OAUW representative how they can continue to improve their service and support.

### **Year Round**

- ✓ Keep employees updated on the activities of OAUW.
- ✓ Promote volunteer opportunities to employees.