Change is possible. You can help.
Welcome to your United Way of Central New Mexico Campaign!
The United Way of Central New Mexico (UWCNM) appreciates your time, creativity, and commitment to make the annual giving campaign at your workplace a success. We want to do everything possible to help reach your campaign goals. In this packet you will find a variety of suggestions, strategies, and tips to help you plan and promote your campaign.

You can download this guide and find additional Employee Campaign Manager (ECM) resources on our website: www.uwcnm.org; including sample letters, logos, and much more! It’s the easiest and quickest way to access the tools that can help you succeed—just click and go! Please be sure to tell your co-workers our web address, also. It’s a great way for them to learn more about UWCNM and our work.

Again, thank you for helping our community by bringing talent and leadership to your United Way campaign.

~ the 2015-2016 Employee Campaign Manager Council

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Vision: Supportive communities where people live healthy and productive lives
Our **mission** is to bring people and resources together to measurably improve lives and strengthen our communities.

UWCNM brings the power of donors, volunteers, and agencies together to improve systems, develop new initiatives, and offer unique services that our communities need. More than 30,000 donors, 70 Cornerstone Partners, 400 workplace campaigns and 2,400 volunteers achieve this mission with UWCNM. Since 1934 UWCNM has served the four-county region of central New Mexico. More information may be found on our website at [www.uwcnm.org](http://www.uwcnm.org).

The primary fundraising goal for the 2015 Campaign is to increase funding for the mission of UWCNM. Cornerstones and Community Fund gifts support this work.

**There are three key positions that make a workplace campaign successful, engaging and morale-building:**

- Provide leadership and direction for the employee campaign within your organization
- Motivate others to get involved
- Work with **Employee Campaign Manager** and **CEO** to set campaign objectives and goals for participation and Community Fund support
- Sign endorsement letter to staff for the campaign
- Coordinate meetings or events specifically for leadership donors and prospects to thank them and encourage their leadership donations
- Attend events or meetings needed by the **Employee Campaign Manager**

- Provide leadership and direction for the employee campaign within your organization
- Motivate others to get involved
- Work with **CEO** and **Executive Champion** to set campaign objectives and goals for participation and Community Fund support
- Develop a Strong Campaign Team
- Ensure that all employees are provided with informational materials and are given the opportunity to contribute and ask questions
- Help employees understand that their contribution affects their family members, friends, neighbors, co-workers, and other people in their community
- Identify strong employees to service as **Employee Campaign Manager** and **Executive Champion**
- Work with **Employee Campaign Manager** and **Executive Champion** to set campaign objectives and goals for participation and Community Fund support
- Allow time for training, group meetings, and agency tours
- Approve incentives as appropriate
- Sign endorsement letter to staff for the campaign
- Attend events/meetings as needed by the **Employee Campaign Manager**
2015 Campaign KEY Talking Points

Vision: Supportive communities where people live healthy and productive lives 
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Cornerstones
Everything that UWCNM is able to accomplish is possible with the support of our Cornerstone Partners.

Cornerstone Partners give all or part of their gift to support UWCNM. Their gifts increase philanthropy by supporting workplace campaigns and individual donor gifts. Help those most vulnerable through the Community Fund and strengthen our community with 2-1-1, the Center for Nonprofit Excellence, the Family Advocacy Center, Tax Help NM, and Mission: Graduate. See the list at http://www.uwcnm.org/cornerstone-partners.

Community Fund
By supporting the Community Fund, you are creating a stronger community through ALL the building blocks for a better life – Education, Health, and Basic Needs and Financial Stability.

The Community Fund measurably improves lives by providing program grants to qualifying health and human service agencies in central New Mexico and by supporting unique services such as 2-1-1, the Family Advocacy Center, TaxHelp NM, and the Center for Nonprofit Excellence. It helps ensure that individuals and families in central New Mexico have the opportunity to achieve potential through education, are healthy and safe, financially stable, and live with dignity.

Community Fund grant awards are made through a rigorous evaluation process by issue area experts working with community volunteers. In addition, the three Affinity Group Grant Initiatives are subsets of the Community Fund: Women in Philanthropy supports Women’s Self-Sufficiency, Hispano Philanthropic Society empowers middle school students through mentorship activities, and YLS assists youth ages 13 to 18 as they transition into adulthood. More information is available at http://www.uwcnm.org/community-fund.

Mission: Graduate
Mission: Graduate is a community-wide initiative to add 60,000 new college degrees and credentials to central New Mexico by 2020.

The goal is to work together as a community to align and coordinate services to keep kids in school—happy, healthy and ready to succeed. This effort is different than any other because (1) it is focused on audacious, yet achievable goals, (2) it uses data intentionally to identify gaps and the most successful practices, (3) it brings together business, education and social service, and (4) it aims to support students through the entire cradle-to-career continuum. UWCNM serves as the backbone support for Mission: Graduate: www.missiongraduatenm.org.

Center for Nonprofit Excellence
CNPE strengthens the capabilities and capacity of nonprofits so they can more effectively achieve their missions.

CNPE offers the community and non-profit organizations a multitude of resources, including training, networking and volunteer opportunities and provides affordable services for nonprofits that want to improve their deep positive impact on the clients they serve. For more information, www.centerfornonprofitexcellence.org.
Running a Workplace Campaign

The purpose is simple: start your campaign off right.
Get employees excited about UWCNM’s impact in our community and how they can help by using creative ways to make your campaign educational and fun.

Helpful Hints:
• Make sure your CEO/management is present. This shows the employees that UWCNM is important to the company as a whole and sets an example for employees to follow.
• Have your Leadership Giving Meeting before your kickoff. This allows you to say thank you for last year and get pledges from your top givers before asking everyone else to give. You can announce the results of your Leadership campaign at the kickoff to motivate employees to join in contributing.
• Get endorsement and support from management by asking them to pledge first.
• Have your kickoff at an all-staff meeting that is already on the calendar. It saves employees from having to make a special effort to attend extra meetings. It’s also a great way to add some spirit to day-to-day agendas!
Steps to a Successful United Way Campaign!

1. Meet and Engage with your CEO
   - Send out a personal letter of endorsement from your president or CEO
   - Have your CEO participate in your kick-off & the overall campaign
   - Discuss corporate gift
   - Discuss and/or develop your campaign budget

2. Recruit a Committee and Plan your Campaign
   - Set your campaign timeline (ten days max)
   - Discuss and/or develop your campaign budget (free incentives do exist if necessary!)
   - Ask for help, keep in mind that people who volunteer are involved because they want to be, and will lend energy to your campaign
   - Decide what your campaign activities will look like (presentations, activities, food and prizes) & ask your UWCNM staff member to coordinate presentation speakers
   - Assign committee tasks and establish target dates for completion

3. Review and Evaluate Past Performance and Calculate Goals
   - Work with a UWCNM staff person(s) and find out about your company’s giving history (5 year history & other reports are available for your organization)
   - Review last year’s campaign and any feedback you received as to what did and didn’t work
   - Incorporate new ideas for this year’s campaign (see Campaign Tool Kit and be creative)

4. Set Employee Goals
   - Create a Community Fund dollar goal
   - Create a percent participation goal
   - Have a volunteer project available for employees (Please work with UWCNM staff member to create your optimal activity)

5. Publicize your Campaign
   - Share how to pledge, when to pledge and what your pledges support
   - Use provided UWCNM materials (i.e. posters, videos, brochures, pledge forms)
   - Mail communications to raise awareness about campaign activities and events
   - Create a section on your company’s intranet to share information about UWCNM and your company’s campaign, linking it to UWCNM’s website (www.uwcnm.org)
   - Use incentives to encourage giving

6. Conduct an Educational Campaign
   - Invite UWCNM staff to present at a large group meeting
   - Use a guest speaker (UW can guide according to your philanthropy)
   - Conduct group presentations for all departments if large meetings are not an option (Remember UWCNM staff are excited and available to attend all your presentations)
   - Ensure every employee receives UWCNM materials
   - Follow up with employees to ensure every employee has been given the opportunity to contribute

7. Promote Leadership Giving
   - Discuss with your CEO Leadership Giving matching opportunities
   - Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO)

8. Ask Everyone to Give
   - Ensure you ask every person to give by asking your committee and any other advocates to reach out to their co-workers (people say the number one reason they didn’t give is because “they weren’t asked”)
   - Include everyone, both active employees and retirees
   - Ask your new hires as part of the HR package
   - Inform employees of the ways they can continue to Give, Advocate and Volunteer

9. Report Results and say Thank You
   - Recognize individuals, groups and departments that went “above and beyond” during the campaign
   - Announce your final results to all employees through a communication from your CEO and/or conduct a finale activity
   - Thank everyone at the time of giving—offer a thank you card or small gift from the company for their participation (templates available online)
   - Make a “Thank You” display (hang posters, campaign activity photos and mementos of the campaign)
   - Give special thanks to your committee (hold a special coffee break at which everyone receives a company ‘item’ and a special thank you from you and the CEO)
   - Collect all pledge cards, place them in your provided report envelope, complete the envelope and schedule a pick-up with your UWCNM representative

10. HAVE FUN!
    - Engage your employees with creative activities that also educate about UWCNM
    - Provide special pledge incentives, such as prizes for certain people such as first time donors, increased giving and/or other levels you feel appropriate to award.
    - Volunteer together (www.centerfornonprofitexcellence.org/volunteer-connection)

Thank you for your hard work!

GIVE. ADVOCATE. VOLUNTEER.

Congratulations on being selected as your company’s Employee Campaign Manager. Not only are you providing a tremendous service to your company, but your efforts will also make a difference - improving lives and building a stronger community. United Way of Central New Mexico (UWCNM) staff are ready to assist however possible. Please visit the Campaign Tools page on www.uwcnm.org/get-involved/workplace-campaigns or simply call 505.247.3671. We look forward to working with you and the impact we can have on the community when we ‘LIVE UNITED’!
United Way of Central New Mexico is the way our community helps itself. Since 1934, it has operated to build a stronger community within the four counties of central New Mexico. We do this in several ways.

- United Way exists to make it easier for neighbors to give to help those most vulnerable.
- We offer many volunteer opportunities for people to engage themselves in their community.
- We serve as a convener, bringing together innovative partnerships between businesses, nonprofits, government, and others to create better solutions to our community’s human service problems.
- We are the largest private human service fundraiser in the state of New Mexico, allocating human service grants through our volunteer review process, and accepting.

UWCNM Programs:

Mission: Graduate
Mission: Graduate is a cradle-to-career education partnership committed to adding 60,000 new college degrees and credentials to Central New Mexico by 2020.

- It is supported by many of Central New Mexico’s top education, business, and community leaders, including our two co-chairs: Kathie Winograd, President of CNM, and Jim Hinton, President and CEO of Presbyterian Healthcare Services.
- In Fall 2013 Mission: Graduate will launch a series of Collaborative Action Networks, consisting of practitioners and community members, which will develop a set of coordinated, collaborative activities, designed to ensure that children and youth excel and succeed from early childhood through high school, graduate with a postsecondary degree or credential, and enter a career of their choosing in Central New Mexico.

2-1-1
2-1-1 provides callers in need with information about and referral to human services:

- Basic Human Needs Resources: food banks, clothing closets, shelters, rent assistance and utility assistance.
- Physical and Mental Health Resources: health insurance programs, Medicaid and Medicare, maternal health, medical information lines, crisis intervention services, counseling, and drug and alcohol intervention and rehabilitation.
- Work Support: financial assistance, job training, transportation assistance and education programs.
- Support for Older American and Persons with Disabilities: adult day care, congregate meals, respite care, home health care, transportation, protective services and advocacy.
- Children, Youth and Family Support: child care, after school programs, Head Start, family resource centers, mentoring, tutoring, and protective services.

Tax Help New Mexico
Tax Help New Mexico is a partnership between UWCNM and Central New Mexico Community College(CNM). This program assists people with annual incomes under $52,000 or age 65 and older, preparing and filing their tax returns for free.

- Gives volunteers the opportunity to gain valuable work experience and the necessary knowledge to become certified Internal Revenue Service tax preparers.
- Assisted almost 20,000 people last year.
**Employee Testimonials**
Ask co-workers if they have personal experiences with UWCNM Community Fund programs and ask them to share their stories. Employees who have benefited from agency services or who have volunteered with an agency can inspire co-workers with their experiences.

**Agency Tours**
Agency Tours are a great way to bring the impact of Community Fund donations to your company. These tours allow employees to see first-hand how their dollars work to benefit the community where they live, work and play. Most agencies can accommodate tours of at least 10 employees per tour and they last about 30 minutes. These tours are a great idea for a Leadership Giving event, make sure you invite Leadership Giving prospects, too! Tours are available year round. Your UWCNM staff can coordinate the event- we just need some details from you and your campaign team.

**UWCNM Events**
Encourage your Leadership Givers to attend UWCNM events. These events are ideal for education, networking, and service. See the section on Leadership Giving for more information or check out more information online at uwcnm.org!

**UWCNM Web Site & Social Media**
Information found on UWCNM website and social media pages can assist you in educating employees and inspiring community interactions. Our Facebook, Youtube, and Twitter pages are a great place to find content that can easily be shared, especially for those of you who are active in one or more of these social media channels:

- **Web Site:** www.uwcnm.org
- **Facebook:** www.facebook.com/UWCNM
- **Twitter:** twitter.com/UnitedWayCNM
- **Youtube:** www.youtube.com/user/UnitedWayOfCentralNM

**Volunteer Connection**
What better way to learn about the needs of our community than to volunteer? Or plan a group/team-building event for a hands-on experience? Check out the New Mexico Volunteer Connection, offered through the Center for Nonprofit Excellence! Just access the site at www.nmvolunteers.org. Please let your UWCNM staff member know how they can help with this effort!
Communicate with Your Co-workers
Before, During, and After Your Campaign

Group Meeting
Group meetings are the best way to increase understanding on how UWCNM improves more lives in our community. The group meeting sample agenda can be adapted to your company and time availability.

Group meetings offer these benefits:
- Require fewer one-on-one presentations and follow ups.
- The campaign team can make a compelling case for support through UWCNM.
- Employees receive inspiring and motivating information.

Sample Group Meeting Agenda

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PRESENTER</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>Employee Campaign Manager</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Distribute Campaign Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(brochures, pledge forms, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endorsements</td>
<td>CEO/Management</td>
<td>3 minutes</td>
</tr>
<tr>
<td>CEO Endorsement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union Leader endorsement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UWCNM Overview</td>
<td>UWCNM Staff Member</td>
<td>7 minutes</td>
</tr>
<tr>
<td>What/who is UWCNM?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Cornerstones</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UWCNM Community Fund</td>
<td>Agency Speaker</td>
<td>7 minutes</td>
</tr>
<tr>
<td>Agency Speaker</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ask for a Gift</td>
<td>ECM or UWCNM Staff</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Closing Remarks</td>
<td>ECM or UWCNM Staff</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Thanks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect Pledge Forms</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Communicate with Your Employees Before, During, and After Your Campaign

Communicating year-round about UWCNM is a great way to create awareness in your workplace. Continuous communication strengthens the message that UWCNM is always present in the community and not just an annual campaign. Here are a few ideas to help motivate, inspire, educate, and encourage your workplace!

Communication Ideas that Work

- Exhibit posters from UWCNM all year, not just during campaign, including 2-1-1 posters.
- Create a bulletin board that discusses the company’s philanthropic efforts. Proudly display volunteer activity photos whether it is one employee or several. Ask for stories and quotes from donors and/or volunteers that can be used to inspire others.
- E-mail success stories and updates about UWCNM to staff each month. This information can be pulled from the monthly electronic newsletter.
- Post volunteer opportunities are available through nmvolunteers.org. Encourage employees to get involved.
- Coordinate a recognition program to thank employees for supporting their community.
- Thank you communications are always welcome. Try sending out emails or cards before, during, and after campaign- especially on Monday to brighten the rest of the week!

Answering Contributor Concerns

Some people in your workplace or community may express concerns about giving. It helps to be prepared to address contributor questions. Here are a few tips to help you.

- Concerns are not personal. A concern is never directed at you; it is directed at some idea you are representing.
- Answer all questions directly, openly, and honestly. If you don’t know the answer, contact UWCNM staff for support or check out the FAQ information on our website.
- Be sympathetic. Listen carefully to what is said.
- Don’t argue. Remember, you want to address a concern, not win an argument.
- Be relaxed and be yourself! Your job is to make a case for supporting your community through UWCNM.

Help UWCNM Say “Thanks”

When you share name and addresses of your donors with UWCNM, we are able to directly thank them for caring. Donor information is not shared with or sold to any other organization. UWCNM has started to send acknowledgement letters for pledges via email- it is better for the environment, keeps our administrative costs low, and gives donors electronic access to their pledge information!

Communications Templates

UWCNM has various templates available to help you get started. The following templates are available on the UWCNM web site at www.uwcnm.org:

- CEO/Management (and Labor) Letters to Employees
- Email Sample
- Voice Mail Wording
- Thank You Letter

Any of the templates can be modified for your purposes. Please let UWCNM know if we can provide any assistance with your campaign communications plan!
Goal-setting Worksheet & Strategies

Setting clear goals gives you a firm foundation. Here’s how:

**Campaign Goal**

- First, review last year’s performance and identify any company changes such as re-organization or a change in the number of employees.
- Second, look at the reports from UWCNM.
  - What trends do you see in participation? Dollars raised? Average gift?
- Third, determine what you and your campaign team can do to work on those factors.

**Goal Setting Example**

Use the following example to help with your goal setting.

**Example:** Last year company B had 100 employees, 35 people gave, and the average gift was $120. This year the company has 92 employees, including the 35 people that gave last year. The Company has decided to increase the 35% participation rate from last year by encouraging more employees to go on agency tours and by holding UWCNM meetings with each department including guest speakers from various non-profits. The company has set a goal of 50% participation this year. How would they set a dollar amount goal with this information?

\[
\begin{align*}
92 \quad \times \quad 50\% \quad \times \quad $120 \quad = \quad $5,520
\end{align*}
\]

# of employees \times \% participation \times average gift = employee dollars

**Your Worksheet**

**Increase participation:**

\[
\begin{align*}
\text{\# of employees} \quad \times \quad \% \text{ participation (GOAL)} \quad \times \quad \text{average gift} \quad = \quad \text{employee dollars (GOAL)}
\end{align*}
\]

**Increase average gift:**

\[
\begin{align*}
\text{\# of employees} \quad \times \quad \% \text{ participation (GOAL)} \quad \times \quad \text{average gift} \quad = \quad \text{employee dollars (GOAL)}
\end{align*}
\]
Other Goal Options:

- Goal of 100% education. How are you going to ensure that everyone knows how UWCNM works to make this a better community for all of us? Brainstorm some ideas.
- Leadership Giving: You can use the scenarios above to establish a goal for Leadership Giving and then make sure that goal is incorporated into your overall goal. Leadership Giving starts at $1,000 a year or $19.24 a week. Remember these dollars include Community Fund and/or agency specific pledges. How would your employee campaign total change if you set a Leadership Giving goal?
- Goal of 100% pledge card collection or donation site access. This ensures that people have considered a gift to UWCNM and made their decision. It does not mean that they should be forced to give. How will you convey that message? How will you ensure that all pledge cards, even for those who currently decline to participate, are collected?

Other Strategies

Take your campaign to new levels with these strategies.

- **Increase Participation & Average Gift:**
  - “Take A Step” strategy – ask employees to increase their gift by a small amount – from $5 to $6 or $20 to $22 per pay period or 10% - give examples: $5.00 to $5.50 a pay period (25¢/wk.)
  - Give examples of combined impact of small increases last year and total gifts from $1 to $5 – every dollar and every gift matters
  - Incentives and drawings for – First-time givers and employees increasing their gifts
  - “One Hour of Pay” per month or pay period or “suggested gift” based on salary levels
  - Early bird pledges
  - Pledging online or turning in pledge form the day of meeting or by certain date
  - Competition between departments for 100% or largest percentage increase in participation
  - “Peer-to-Peer” ask by ambassadors
  - Solicit Retirees during campaign and New Hires throughout the year

- **Incentives – (time off is the most popular)**
  - Angel Day – day off for one hour of pay a month
  - Week of ½ hour “leave early”, “sleep in”, or “longer lunch” passes
  - Casual Day stickers
  - Company logo items, movie tickets, concert tickets, restaurant, or other gift certificates
  - Secure prizes from vendors & local businesses

You are on your way to a successful campaign!
UWCNM 2015 Campaign Team

We’re here to help you and your company run a successful campaign!

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