Focused on the Future

Campaign Fundamentals

The 2017 Employee Campaign Manager’s guide to running a fun and successful giving campaign.
Welcome!

Welcome to your United Way of Central New Mexico Campaign!

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 you reach your campaign goals. This packet contains a multitude 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: uwcnm.org/you-can-help/workplace-giving/campaign-tool-kit; including sample letters, logos, and much more! It's the easiest and quickest way to access tools to 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.

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

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Glossary of Terms and Acronyms

Affinity Group Members - Those who have actively joined a UWCNM leadership giving group. These include:

- Young Leaders Society
- Women in Philanthropy
- Hispano Philanthropic Society
- Guys Give
- Tocqueville Society

Agency - A nonprofit organization that is focused on community service work.

CC / Campaign Coordinator / CampCo - Temporary United Way campaign support staff.

Cornerstone Companies - Companies that make a corporate donation to support the work of the United Way of Central New Mexico.

Community Fund Speaker - A United Way volunteer that has been trained to present and educate on our work.

DO / Development Officer - The United Way employee who works with you and your organization to conduct a workplace campaign.

ECM / Employee Campaign Manager - You! The employee at an organization who has been chosen to run their workplace giving campaign.

Leadership Givers - Those who give at least $1,000 to the United Way each year. Young Leaders Society donors may give $500 per year to be considered leadership givers.

Loyal Donors - Those who have given to United Way for 10 or more years, any amount.

Campaign Season: August - December
United Way brings the power of donors, volunteers, and community service agencies together to create systematic change. UWCNM has served the four-county region of central New Mexico since 1934. We are able to achieve this mission with the support of:

- Over 28,850 donors
- 60 Cornerstone Partners
- 316 workplace campaigns
- 2,400 volunteers

Our goal for the 2017 Campaign is to increase funding for the mission of United Way of Central New Mexico. Gifts to our work are integral to this.

Our mission is to bring people and resources together to measurably improve lives and strengthen our communities.
There are three key positions that make a workplace campaign successful, engaging and morale-building:

- Provide leadership and creative energy for the employee campaign within an organization
- Motivate others to get involved
- Work with Employee Campaign Manager and Executive Champion to set campaign objectives and goals for participation and Community Fund support
- Sign endorsement letter to staff for the campaign
- Attend events/meetings as needed by the Employee Campaign Manager

- 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 how their contribution affects their family members, friends, neighbors, co-workers, and other people in their community
- Keep employees aware of year-round initiatives of UWCNM.
Before Your 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 a corporate gift, as appropriate
   - Discuss and/or develop your campaign budget

2. Recruit a Committee and Plan your Campaign
   - Set your campaign timeline
   - Discuss and/or develop your campaign budget (free incentives do exist)
   - Ask for help, keep in mind that people who volunteer will lend energy to your campaign
   - Decide what your campaign activities will be (presentations, activities, food and prizes) and ask your UWCNM staff member to coordinate presentation speakers
   - Assign committee tasks and establish target dates for completion
   - Find ways to personalize the campaign

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

4. Set Employee Goals
   - Create a Community Fund dollar goal
   - Create a percent participation goal
   - Have a volunteer project available to employees. Just access the CNPE site at www.nmvolunteers.org
Goal Options

Some Ideas to Consider When Setting Up Your Campaign

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
  - 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 by a certain date
  - Competition between departments for 100% or largest percentage increase in participation
  - “Peer-to-Peer” asks by ambassadors, loyal contributors, affinity group members
  - 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

You are on your way to a successful campaign!
During Your Campaign

DURING
COMMUNICATION & CAMPAIGN ACTIVITIES

Publicize your Campaign
1. Share how to pledge, when to pledge, and what your pledges support
2. Use provided UWCNM materials (i.e. posters, videos, brochures, pledge forms)
3. E-mail communications to raise awareness about campaign activities and events
4. 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)
5. Use incentives to encourage giving
6. Let your clients and vendors know you run a campaign on social media

Conduct an Educational Campaign
1. Invite UWCNM staff to present at a large group meeting
2. Use a guest speaker (UWCNM can arrange this for you)
3. 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)
4. Ensure every employee receives UWCNM materials
5. Schedule a visit with an agency (UWCNM can arrange this for you)
6. Follow up with employees to ensure every employee has been given the opportunity to contribute
7. Ask co-workers if they have personal experiences with UWCNM Community Fund programs and ask them to share their stories—they can inspire others with their stories

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

Ask Everyone to Give
4. Ensure you invite everyone 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”)
5. Include everyone, both active employees and retirees
6. Ask your new hires as part of the HR package
7. Inform employees of the ways they can continue to Give, Advocate, and Volunteer
8. Ask your United Way contact to set up an agency tour
9. Ask your co-workers if they have any experience with United Way that they are willing to share
10. Sign up for a group activity through volunteer connection, www.nmvolunteers.org

Stay Connected
5. Check our social media for ideas and updates so you can help employees and inspire community interaction

www.uwcnm.org
@UWCNM
@UnitedWayCNM
UnitedWayofCentralNM
Communicate

Group Meeting
Group gatherings are the best way to increase understanding on how UWCNM improves more lives in our community. They offer the following benefits:

- They require fewer one-on-one presentations and follow ups
- Allows the campaign team to make a compelling case for support through UWCNM
- Employees receive inspiring and motivating information

The meeting sample agenda below can be adapted to your company and timeline.

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 min</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 min</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 min</td>
</tr>
<tr>
<td>• UWCNM / and the Community Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UWCNM Community Fund / Agency Speaker</td>
<td>Guest Speaker</td>
<td>7 min</td>
</tr>
<tr>
<td>Ask for a Gift</td>
<td>ECM or UWCNM Staff</td>
<td>2 min</td>
</tr>
<tr>
<td>Closing Remarks</td>
<td>ECM or UWCNM Staff</td>
<td>2 min</td>
</tr>
<tr>
<td>• Thanks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Collect Pledge Forms</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
After Your Campaign

AFTER CAMPAIGN COMPLETION

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 forms, place them in your provided UWCNM envelope, complete the information on the front and schedule a pick-up with your UWCNM representative
• Read the United Way E-Newsletter to keep informed about engagement opportunities in central New Mexico and convey news to the staff
• Invite your Development Officer to speak at staff meetings off campaign time for good work updates
• Plan a group/team-building event for a hands-on experience, check out the New Mexico Volunteer Connection at www.nmvolunteers.org

HELP UWCNM SAY “THANKS”

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

THANK YOU!
UWCNM 2017 Campaign Team

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

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