



**UNITED WAY**  
South Central  
Massachusetts

# **Workplace Champion Guide**

**Champion** / [cham-pee-uh n]

1. A person who fights for or defends any person or cause. Example: You are a Champion of United Way in your workplace.
2. A person who takes first place. Example: The person who serves as a United Way Champion is a winner for taking on this role.

THANK YOU for taking on this role as the United Way Champion in your workplace. Whether you volunteered, or were volunteered by someone else, know the importance of your role and the impact you can make.

As a United Way Champion, you'll have an opportunity to showcase your leadership and project management skills at work, network with colleagues at your workplace and in other industries, and create positive impact in our community.

We've prepared this guide to help you maximize your time and effort. Trust us. These tips are proven to work. If you follow them, your workplace campaign will be successful.

**Kristin McCarthy**  
Executive Director  
[director@uwscm.org](mailto:director@uwscm.org)  
[www.uwscm.org](http://www.uwscm.org)

**176 Main Street, Suite 400**  
**Southbridge, MA 01550**  
**508-765-5491**  
**774-347-3088**



## THE 3 “BEST PRACTICES”

Whether you’ve been a United Way Champion for years or if this is your rookie year, statistics show you **WILL** be successful if you implement these three strategies.

# #1

### SCHEDULE A FORMAL UNITED WAY PRESENTATION TO LAUNCH YOUR CAMPAIGN AND DISTRIBUTE PLEDGE FORMS AT THE MEETING.

- Workplaces that had a formal UW presentation to launch their campaign last fall had a 10% increase in giving. Workplaces that did not had little to no increase.
- Consider how inspired someone will be to give within 10 seconds of receiving a pledge form. That’s why a 10-15 minute presentation during an already scheduled employee meeting is ideal. We can do multiple presentations to accommodate different shifts and departments.

# #2

### ASK YOUR CEO / TOP EXECUTIVES TO PUBLICLY ENDORSE YOUR UNITED WAY CAMPAIGN AT THE LAUNCH MEETING AND/OR IN EMPLOYEE PUBLICATIONS.

- Workplaces in which the CEO publicly endorsed the UW campaign and encouraged giving had a significant increase in giving. Workplaces that did not had none or even a decrease.
- Make the connection that giving back as a workplace through United Way is a part of your corporate culture and fulfills your philanthropic mission to give back to our community.

# #3

### MEET WITH UNITED WAY STAFF IN ADVANCE TO PLAN, BRAINSTORM, AND CUSTOMIZE YOUR INTERNAL CAMPAIGN FOR MAXIMUM RESULTS.

- Campaign Champions who meet with us in advance or attend campaign training have more success than those that do not.



**New to United Way campaigns?** This page is for you. Since 1937, local businesses have been achieving their local philanthropic goals by giving back through United Way workplace campaigns. Why?

**Because United Way works.** United Way fights for the health, education, and financial stability of all in Charlton, Dudley, Southbridge, Sturbridge, and Webster.

**Because giving to United Way is easy.** Most people give via payroll deduction, pledging in the fall to have a certain amount taken out of each paycheck the following year. United Way's materials are easy to distribute and collect. After some planning and a brief 1-2 week solicitation period (your internal workplace campaign), you're done!

**Because there's something for everyone.**

Since 15,000 local residents are impacted by United Way programming, almost everyone will know someone who's benefitted (maybe even themselves).

**Because United Way is effective.** Money raised here stays here and goes directly to someone who needs it.



#### THE TYPICAL WORKPLACE CAMPAIGN...

- Runs actively for 1-2 weeks.
- Runs sometime between October 1 and Thanksgiving (you pick the dates that best serve you).
- Uses United Way brochures and pledge forms that we provide.
- Most donors give via payroll deduction, pledging to give \$\_\_\_\_per pay period during the following year (Jan. 1 to December 31).
- Some donors give via cash, check, or ask to be billed to pay later themselves.

#### YOUR ROLE AS WORKPLACE CHAMPION...

- Serve as main contact between United Way and your workplace.
- Lead the planning and coordination for a successful internal campaign.
- Recruit others to help with your internal effort.
- Collect and submit all pledge forms and monetary donations to United Way in a timely manner. Includes completion of the Workplace Giving Envelope completed at the end of your internal campaign.
- Submit all pledge forms to payroll for processing and payment.

#### OUR ROLE AS UW STAFF & VOLUNTEERS...

- **TO HELP YOU IN ANY WAY POSSIBLE! Never hesitate to call with questions or to help with campaign strategies.**
- **PLEASE reach out when ready to schedule a Campaign Presentation.**

## DETERMINE THE GIVING CAPACITY OF YOUR WORKPLACE

	<b>Benchmarks</b>	<b>Your Workplace Results from Last Year.</b>	<b>Your Workplace Goals – This Year</b> Set realistic goals.
<b>Total Employees</b>	Reach a significant goal and your workplace will be recognized at the Awards Dinner	_____	_____
<b>Set a participation goal</b> (100% Ask? Yes. 100% Give? Probably not.)		_____	_____
<b>Total GIVING employees</b>		_____	_____
<b>Set an “Average Gift” goal</b>	Example: average is \$125	_____	_____
<b>Total employee goal – Pledge Forms</b> (Multiply your total GIVING employees by your “Average Gift.”)		_____	_____
<b>Corporate Giving</b> (Discuss with your team how/if your company will participate.)	<ul style="list-style-type: none"> <li>• 100% match</li> <li>• % of total gift</li> <li>• Set \$ amount match</li> </ul>	_____	_____
<b>Other “Fun-raisers”</b> (OPTIONAL: Do not make these a priority over giving via pledge forms and payroll deduction.)		_____	_____
<b>TOTAL WORKPLACE CAMPAIGN GOAL</b>		_____	_____

## TIPS TO INCREASE GIVING LEVELS

**So you've set your goals. Now to achieve them!** Participation rates and average giving levels don't just magically increase. Here are some proven tips to boost them to the next level by engaging your team in the United Way.

### TO INCREASE DONOR PARTICIPATION...

- **Launch your giving effort by inviting United Way to already scheduled all-staff or department meetings for a brief 10-15 minute presentation.**
- **Have pledge forms ready at those meetings and encourage staff to fill them out before they leave.**
- Set a goal of 100% ASK. Make sure every person hears the message and has an opportunity to give.
- Attractive incentives help motivate giving. They don't have to cost a lot. But it will increase participation and build excitement. (See more on the next page.)
- Post United Way announcements and posters on bulletin boards and in employee publications. Share links to our website and social media posts.
- Publicly track progress and send daily reminders, especially on the last day.
- Right after your last day, follow-up with past donors who forgot to turn in a form.
- Extend the giving opportunity to new hires throughout the year.

### TO INCREASE YOUR AVERAGE GIFT...

- **Stress giving via payroll deduction.**
- Promote and incentivize donors to increase their gift to the next "level" (by 10%, or \$1 a pay) over last year's.
- Add incentives for tiered levels of giving. For example, \$5/pay, gets you one benefit or maybe you are entered into a raffle with five ticket. If you give \$10/week, you get two benefits or get 10 raffle tickets.
- **(SEE MORE ABOUT INCENTIVES ON THE NEXT PAGE.)**
- Leverage "fun-raisers." Ask for a completed pledge form, rather than a small cash donation. For example, instead of "selling" Jeans Day passes for \$5, ask that they pledge a certain amount via payroll deduction.
- Hold your United Way launch meeting on a payday, a Friday, or just after a "good news" announcement.
- Conduct your United Way campaign apart from other internal fundraisers.
- Ask an associate who has benefitted from a UW program to share their story.





**If only everyone were 100% altruistic.** What inspires giving? Sometimes providing an extra incentive is one of the most sure-fire ways to increase participation rates and average gifts in your workplace. You don't have to go over the top on these either. There are many low-cost / no-cost ways to obtain items as incentives.

### NO-COST / LOW-COST INCENTIVES

- Prime parking spaces
- Jeans day passes
- Company SWAG and gear
- Donuts and coffee
- Pizza party / Free lunch

### OTHER ATTRACTIVE INCENTIVES

- Tickets to movies / sports / concerts
- Airline tickets
- Trendy electronics
- Restaurant gift certificates
- Hotel / Resort weekend getaway
- Gym membership
- Gift baskets

**TIP:** To get more mileage out of your incentives, spread them out so more people win. For example, if you are raffling off a "United Way parking space" near the front door, get 12 winners (one for each month).

# #1

### IF YOU CAN SWING IT, THE BEST INCENTIVE YOU CAN OFFER IS EXTRA PAID TIME OFF

- Vacation Days
- "Sleep-in" passes
- Leave work early passes

# ??

### WHERE TO GET INCENTIVES

- Ask your vendors
- Trade with other UW corporate supporters
- Unused Credit Card rewards
- Use a portion of your corporate gift to purchase items

### HERE COMES THE CRITICAL PART...

To get the most out of incentives, consider how best to structure them for your campaign. Think about what you want to accomplish, then decide how to set your incentives. Examples below:

**By individual participation:** Anyone who gives via payroll deduction is eligible for a prize / drawing.

IDEA: For each dollar someone gives/week, that's how many chances they have.

**By timeframe:** Anyone who contributes by X day is eligible for a prize/drawing.

IDEA: If you turn in your pledge form at the UW presentation meeting.

**By increase:** Anyone who increases their gift over the previous year by \_\_\_\_\_% or to next giving level is eligible.

IDEA: Promote "Hour a Month" giving, which would be equivalent to 1% of your annual salary.

**By gift level:** Anyone who gives XX dollars or more is entered into a special drawing.

IDEA: Set tiers of incentives. Those who give \$10/week are eligible for more than those who give \$1/week.

**By company goal:** If the company achieves its amount raised goal, all employees can wear jeans on Friday or some other celebration.

# GIVING LEVELS

## CAMPAIGN CORPORATE AWARDS

### UWSCM Business Size Classifications

- Small Business (25 or less employees)
- Medium Business (26-399 Employees)
- Large Business (400 or more employees)

#### Top Donor Award

#### Giving Excellence Award

**Diamond Award** - \$30,000 or more  
(Employee & Corporate Gift)

**Good Neighbor Award** - \$10,000 or more raised

**Appreciation Certificate** - \$5,000 to \$9,999  
raised

## INDIVIDUAL DONOR LEVELS

### CIRCLE OF FRIENDS

**Friend** - Up to \$49

**Neighbor** - \$50 - \$249

**Impact** - \$250 - \$499

**Advocate** - \$500 - \$999

**Leader** - \$1,000 +