



Together,
we can
build
brighter
futures.

Employee Campaign
Manager Toolkit



United Way
of Greater Nashville



Thank you for your support.

By becoming an Employee Campaign Manager for your workplace's United Way of Greater Nashville annual campaign, you're helping to solve some of our community's toughest challenges. It takes a special person to manage a workplace fundraising campaign: a person with leadership skills, creativity, enthusiasm and compassion—a person who believes that together we can create a community where every person has an equal chance at a bright future.

With your help, we can break the cycle of multi-generational poverty; give all kids an equal chance to learn and succeed; meet our neighbors' basic needs; and build strong, healthy communities.

We hope this endeavor makes a difference in your life, as it has for so many others who have taken on this leadership role.

This guidebook is full of ideas and information to help you manage a successful campaign. Remember, your Account Manager is just a phone call or email away with additional support and direction.

Thank you for making Greater Nashville a place where every child, individual and family thrives.

Sincerely,

Dave Walton
2023 Campaign Cabinet Chair

Brian Hassett
President and CEO

Your Campaign

The First Rule of Fundraising

You raise money when you ask for it. Remember, you are providing the opportunity to make a difference and be part of a group of people committed to changing our community for the better. Don't be afraid to ask. Your focus is on people helping people. The most successful workplace campaigns have the early and full support of the company's CEO.

- Prior to beginning your campaign, meet with your CEO and other top executives within the organization.
- Establish a timeline and budget with CEO feedback.
- Ask your CEO to send personal correspondence (i.e. letter, email, payroll insert, etc.) to each employee asking for campaign support and contribution. United Way can provide customizable templates.
- Arrange for your CEO to speak at your campaign kickoff celebration.
- Ask your CEO and other top executives to be present at campaign meetings and attend campaign activities.
- Ask your CEO and other executives to join you in kicking off the campaign by making the first leadership pledge (\$500+).

Setting Your Goal

A workplace goal provides an incentive to give and measure success. Set a workplace goal to encourage an increase in giving year over year. The worksheet included here can help you calculate your company's investment potential.

5 Steps To Set Your Goal				
1	Calculate your company's total dollar potential using one of these two formulas	A. $.01 \times \text{total payroll}$	=	
		B. $.01 \times \text{average annual salary} \times \text{number of employees}$		
2	Amount raised last year			
3	Percentage of total potential achieved			
4	This year's goal			
5	Percentage of potential goal			

Campaign Planning Worksheet

TASK	DATE COMPLETED	NOTES
Meet with your United Way Account Manager for a planning meeting.		
Obtain CEO endorsement and support.		
Appoint Employee Campaign Manager and recruit campaign committee.		
Appoint Leadership Giving Chair and recruit leadership committee.		
Secure a corporate gift or corporate match commitment.		
Determine pledge tool (<i>eWay</i> or <i>ePledge</i>).		
Request CEO/management appearances at kickoffs, rallies and presentations.		
Set campaign goal.		
Determine marketing and communications strategy.		
Choose campaign methods.		
Set incentives.		
Establish or continue leadership giving program.		
Plan special events (virtual or in person).		
Plan company leadership meetings and kickoff presentation.		
Send email communications to notify staff of campaign activities.		
Send letter from top executives to all employees encouraging participation.		
Calculate results to include total dollars, number of donors, number of employees and leadership givers.		
Report final results to your Account Manager during an audit.		
Thank campaign committee and employees with events and letters. Be sure to report results.		
Invite all employees to sign up for the UWGN newsletter and follow on social media.		

Elements of a Successful Campaign

Team

- Recruit team members from all departments, levels, locations and professional talents.
- Include your United Way staff contact in team meetings.
- Include your Marketing and HR team for your internal communications plan.
- Review prior campaign practices and brainstorm new ideas with your team.
- Establish specific duties for each member and develop a strategy and timetable for reaching your fundraising goals.

Marketing

- Provide educational opportunities, such as company-wide campaign kick-off meetings.
- Identify an employee who is willing to provide a personal testimony through email or at presentations.
- Use employee publications, bulletin boards, email, newsletters, paycheck stuffers and social media to spread the message.

Kickoff

- Employee kickoff meetings are the most effective way to reach all employees and can take as little as 10 to 15 minutes.
- Start a great campaign by offering incentives to attend.
- Make sure employees know the purpose of the meeting in advance.
- Distribute brochures ahead of meeting.
- Invite a United Way staff member or company executive to speak at the event.
- Ask your CEO to attend and publicly endorse the campaign.
- Show videos and client success stories.
- Share company-wide campaign goal and incentives.
- Keep the meeting lively, informative and fun.
- Make the ask!
- Thank employees for their participation and follow up with those who were not able to attend.

Elements of a Successful Campaign (continued)

Incentives

- Set participation rate as a company goal.
- Hold a raffle for everyone who participates (days off, gift cards, etc.).
- Hold competitions between stores, branches, locations or departments based on participation rate.
- Host a wrap-up party and thank everyone who participated.
- Hold special events like virtual golf tournaments, trivia contests and scavenger hunts.
- Monitor your campaign and report results.
- Keep regular totals and give progress reports to your team, United Way Account Manager and your CEO.

Appreciation

- Recognize your team and others who volunteered their time.
- Thank employees for their participation, time and support; a thank you letter from the CEO is particularly effective.
- Publicize your results via email, newsletters and social media.
- Celebrate your success!

Engagement

- Stay connected with us year-round to hear updates on our work. Sharing these updates will help make next year's campaign even more successful.
- Identify next year's Employee Campaign Manager and share their information with your United Way Account Manager.
- Start a new hire program that gives new employees the opportunity to make a contribution when they join your organization. Your United Way Account Manager can help you get started.



Sample Timeline

Two Months Before Your Campaign Starts

- Schedule a planning meeting with your United Way Account Manager.
- Create your campaign committee.
- Choose campaign dates.
- Plan your kickoff and fundraising events.

One Month Before Your Campaign Starts

- Hold a meeting with your leadership team to get their support and participation in events.
- Share campaign dates and theme with staff.
- Schedule a speaker for your kickoff event (*through your Account Manager*).

Campaign Launch and up to Two Weeks Prelaunch

- Post campaign collateral (*posters, flyers, one-pagers, etc.*) in newsletters, emails or your intranet. Send pre-campaign launch and campaign launch letters (*provided by United Way or customized*) via email, intranet, newsletter or all of the above; include video where applicable.
- Hold your kickoff meeting and share campaign video.
- Send emails directing employees to company pledge site.

Two Weeks to One Month After Campaign

- Send thank you letter, along with results, to all donors.
- Conduct final audit with Account Manager.



Sample Email Communications Schedule

We make it easy to communicate with your employees by offering turnkey email templates that can be copied and pasted into your email browser. Visit unitedwaygreaternashville.org/campaign-toolkit to download our customizable templates. If you need assistance, your Account Manager is only a phone call or email away.

Up to Five Days Before Campaign

Email 1: Introduction/Teaser

During Campaign

The below emails are designed to be sent every day of your campaign—from kickoff to the last day—based on a typical two-week campaign. However, you are welcome to mix and match based on your workplace, your goals and the needs of your specific campaign.

Email 2: Campaign Kickoff

Email 3: Give Now

Email 4: Incentives

Email 5: Focus on Poverty

Email 6: Every Dollar Counts

Email 7: Update on Campaign Goal

Email 8: Focus on Education

Email 9: Focus on Communities

Email 10: Focus on Basic Needs

Email 11: Last Chance

Let's get started.

United Way of Greater Nashville

Serving Cheatham, Davidson, Dickson, Hickman, Houston, Montgomery, Robertson, Stewart and Williamson counties

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