

GIVE. ADVOCATE.
VOLUNTEER.



Oshkosh Area United Way

CAMPAIGN CHAMPION HANDBOOK

Welcome to United Way. You're Awesome!

Thank you for serving as an Employee Campaign Champion (ECC) for the Oshkosh Area United Way! Your energy and effort is greatly appreciated.

As an ECC, you have the unique opportunity to harness the generosity, talent and energy of your workplace to give back to the community and help United Way's efforts in building a stronger, healthier Oshkosh.

What's in it for you? Every self-help article related to career advancement offers up the idea "take on special projects that highlight your leadership and technical skills".

Becoming an ECC is the perfect opportunity to do just that:

- Refine and showcase your leadership and project management skills.
- Network within your company. As an ECC you will have the chance to speak with co-workers you might not normally have the chance to meet.
- Take advantage of the networking opportunities outside your company - you could make key connections to secure new business or relations.
- Make sure to put this experience on your resume and connect to the people you meet on LinkedIn.

Whether this is your first year as a campaign champion, or if you are a campaign veteran, the information in this guide will help you plan and execute a smooth and successful United Way campaign. We encourage you to use the materials we've provided and know your United Way relationship manager is always ready to support you in every possible way.

Thank you again for joining the United Way team!



UNITED WAY CAMPAIGN TIMELINE

PLAN

4-8 weeks prior to Campaign

- » Meet with your CEO & United Way Relationship Manager
- » Analyze your prior year results and set new goals
- » Build a team
- » Learn about United Way

PREPARE

2-4 weeks prior to Campaign

- » Set campaign goals, objectives, timelines and strategies
- » Plan your activities
- » Request campaign materials and other resources
- » Complete campaign planning

CONDUCT

2-3 weeks during Campaign

- » Communicate to your workforce
- » Make your campaign fun and engaging
- » Distribute and collect personalized pledge forms
- » Follow up with employees and past donors

CONCLUDE

1-4 weeks after Campaign

- » Report your results
- » Thank donors
- » Debrief with your United Way Relationship Manager

CONTINUE

Year-round

- » Develop a year-round United Way communication and engagement strategy

UNITED WAY CAMPAIGN TIMELINE

6-8 weeks prior to campaign > PLAN

Meet with your CEO & United Way Relationship Manager (RM)

We are here to make you look good!

Review past performance and explore upcoming campaign themes and materials.

Assess prior year data

- Employee giving totals
- Leadership giving totals
- # of employees
- # of donors
- # leadership givers
- Employee participation (total donors divided by total employees)
- Previous 3-year giving totals
- Difference year-to-year (%)

Identify opportunities and challenges

- Average gift (\$) x (#) of new donors = total increased participation
- # of new leadership givers (\$1,000+ annually) x \$1,000 = total leadership increase
- Set your budget for the campaign
- There may be opportunity to increase your support through contribution matches, corporate gifts, or sponsorships as well
- Utilize the campaign to help with your Corporate Social Responsibility (CSR) or employee engagement goals
- Survey your employees to learn what issues they care about

UNITED WAY CAMPAIGN TIMELINE

6-8 weeks prior to campaign > **PLAN**

BUILD A TEAM.

Define internal roles and responsibilities.

Don't run your campaign alone! Recruit a committee of enthusiastic, resourceful and committed employees to help plan the best campaign possible.

Shake it up

- Involve senior management, marketing/communications, human resources
- Include a representative from each department, location and/or shift, and a labor representative
- Involve longtime loyal contributors
- Include interns and millennials to engage them and develop their teamwork and leadership skills

Stay regular

- Set up regular committee meetings and delegate responsibilities
- Invite your United Way RM to meetings

Lead by example

- Have your committee take on leadership roles with events and activities

Learn about United Way.

Knowledge is power!

If you were to ask most people what United Way does, they'd tell you we raise money and give it away to other nonprofits. And they'd be correct, but that's not the WHOLE story.

Who we are and what we do.

- Review pages 6-8 of this guide
- Check out our website www.oshkoshunitedway.org
- Watch our video ([LINK](#))
- Follow us on social media ([LINK](#))
- Subscribe to our newsletter ([LINK](#))
- Invite your United Way RM to give a presentation to your committee team
- Review

What does Oshkosh Area United Way do?

Oshkosh Area United Way is a charitable nonprofit that works closely with community leaders to identify the biggest needs of the Oshkosh area.

We offer grant opportunities to programs that address these identified issues to improve the quality of life for everyone.

99% of the money that is donated here stays here. As a result, United Way impacts 1 in 3 people through funded programs.

We believe in making our community stronger. By working together on critical issues, we take steps to improve our community where we work, live, and raise a family.

OSHKOSH AREA UNITED WAY IS COMMITTED TO CREATING THE OPPORTUNITY FOR EVERY PERSON TO THRIVE.

**WITH YOUR SUPPORT
WE CAN TRANSFORM
INDIVIDUAL LIVES AND
CREATE POSITIVE CHANGE BY
IMPROVING THREE AREAS:**



Health

Connect residents to health and human services, provide healing and crisis intervention for all children, adults, families, and seniors, and provide dental care for a free or reduced price.



Education

Provide parents and children with tools to encourage increased literacy proficiency, early childhood development, and overall school-readiness.



Financial Stability

Support efforts to create financially-stable, self-sufficient households by improving skills to successfully gain employment, increase transportation to rural areas, and provide financial counseling.

Why Oshkosh Area United Way?

We tackle root causes.

United Way takes on the huge, tough, complex issues that no single organization can solve alone. Your financial gift drives partnerships and programs that get to the root causes of our biggest problems.

United Way is trustworthy.

We closely monitor the organizations that receive your donations, ensuring they are fiscally responsible and deliver results. You can trust us to stretch your dollar for the biggest impact.

United Way is local.

Contributions stay in our community. Your donations help many grassroots, small nonprofits who understand our local needs. United Way provides them with managing expertise and connects them to the broader nonprofit community. With United Way's grants, our local nonprofit partners can focus more on their shared work and less on fundraising.

DID YOU KNOW?

46%

of households in Winnebago County cannot afford basic needs.

40%

of Oshkosh Area School District students have high levels of anxiety, 27% of students report being depressed, and 16.4% have considered suicide.

1 IN 3

People in the Oshkosh area benefit from United Way supported programs.

**WE ARE WORKING ALL OVER
THE COMMUNITY EVERY DAY TO
EMPOWER OUR NEIGHBORS TO
BUILD BETTER LIVES.**

United Way's campaign is about bringing people together to tackle our community's most challenging issues – because no one person or organization can do it alone.

We are your partners in **Corporate Social Responsibility**

Brand Recognition:

We'll help tell your story to the community and your customers.

Volunteer Opportunities:

We can provide educational and interactive projects for your team, helping them to more deeply understand the issues we are addressing.

Year-Round Employee Engagement:

Employees stay connected to our mission throughout the year.

Employee Giving Campaign:

We'll help you innovate your giving campaign and make it more effective or more grassroots.



UNITED WAY CAMPAIGN TIMELINE

2-4 weeks prior to campaign > **PREPARE**

SET YOUR GOALS.

Keep them challenging, yet attainable

Be ambitious but realistic so your coworkers have an attainable goal to reach.

Establish campaign goals, objectives, timelines and strategies

- Identify areas of greatest potential growth within your organization
- Set participation and monetary goals
- Brainstorm incentives for giving
- If you need help, your United Way RM can help or even put you in touch with a seasoned ECC from another one of our partners

PLAN YOUR ACTIVITIES.

Determine your timeline

The events and activities that take place during a campaign are awesome team building opportunities. Help keep everyone connected to Oshkosh Area United Way's mission while having fun together.

Nail down logistics

- Review "Tips for a Successful Campaign" ([LINK](#))
- Set your campaign start and end dates
- Plan a United Way campaign kickoff event
- Schedule campaign presentation(s) for employees with your RM
- Hold fundraising events ([LINK](#))
- Plan engagement opportunities to educate your colleagues about their impact ([LINK](#))

Meet with your CEO

- Get his/her personal endorsement
- Approval for events, incentives, payroll deduction etc.
- A corporate gift

Complete Campaign Planning

- Develop a communication plan
- Request campaign materials and other resources ([Online Form](#) or [Fillable PDF](#))

UNITED WAY CAMPAIGN TIMELINE

1-4 weeks during campaign > **CONDUCT**

COMMUNICATE TO YOUR WORKFORCE.

Educate your employees and promote your campaign & events

Always tie your talking points and written materials back to pages 6-8 (we all want to sing from the same song book!) We also have materials – printed and electronic – for you to use at any time.

Com·mu·ni·ca·tion

- Utilize our "Sample Campaign Announcements" for ideas on communication ([LINK](#))
- Send a "Campaign Kickoff" letter from your CEO endorsing and announcing the campaign (upload letter to your intranet)
- Display our print materials in high-traffic areas (break rooms, bathrooms, board rooms & elevators)
- Don't forget technology – Share statistics, letters, videos, etc. on your intranet and through email
- Utilize available employee testimonials on why they give
- Acknowledge your loyal contributors (5+, 10+ donors)
- Publicize community facts
- Update employees on the Campaign progress

HAVE FUN!

Make your campaign enjoyable and engaging

People rarely succeed unless they have fun in what they are doing.

Ways to add fun

- Share photos of persons participating in meetings & events via your intranet and social media
- Have incentives for attending meetings and submitting pledge forms
- Offer rewards for reaching intermediate and final goals
- Use friendly competition to raise awareness – which department can "out-fundraise" the others

UNITED WAY CAMPAIGN TIMELINE

1-4 weeks during campaign > **CONDUCT**

MAKE THE ASK.

Distribute and collect pledge forms

Research shows that the #1 reason people don't give is because they were never asked.

Distribute and collect pledge forms

- Ensure every employee receives a pledge form and has the opportunity to give
- Be sure to include part-time and retired employees
- Send due date reminders
- Review "Handling Potential Objections" ([LINK](#))
- Collect all pledge forms to ensure all employees were asked and had the opportunity to participate
- Ask your United Way RM about electronic pledging

Follow up with employees and past donors

- Follow-up with employees who may have been on vacation or out of the office
- Look at last year's donor list and follow-up with anyone who may have missed the opportunity
- Follow-up with employees who haven't turned in a pledge form

UNITED WAY CAMPAIGN TIMELINE

1-2 weeks after campaign > CONCLUDE

WRAP UP. REPORT OUT.

Finalize your campaign

The steps below outline the process to follow to successfully close out your Oshkosh Area United Way Campaign.

Schedule an end date

- Publicize your campaign's end date so employees know when the last day to give will be

Close out financial information

- Collect all pledge forms, special event money, and corporate gift
- Inform your United Way RM of when you'd like to close your online giving portal

Report your company's success

- Submit the final report to your United Way RM in the campaign report envelope
- Turn in results by the campaign deadline to ensure employees' entry in the Car Giveaway Sweepstakes and recognition at the Community Celebration
- Work internally with your payroll team to ensure they have what they need to close out the campaign

Debrief with your United Way Relationship Manager

- Review final campaign results
- Evaluate and document your campaign and save copies of contacts, timelines and agendas
- Identify campaign strengths, opportunities and suggestions for next year

SAY THANK YOU.

Express appreciation for employee involvement

Ensure that your employees had a positive and rewarding experience with the campaign.

Thank donors

- Thank donors, employees, and your team in a timely fashion after the campaign
- Announce campaign results to all employees and retirees
- Thank all donors with a letter or email from your CEO
- Celebrate with your office and with us! Coordinating a campaign-close event is a great way to bring all your employees together, to recognize them and their hard work during this year's campaign
- Thank your CEO for their involvement
- Thank your committee for their hard work
- Contact your RM to set up a photo opportunity with a large check
- Celebrate with us at Oshkosh Area United Way's Community Celebration event...so we can say thank you to you too!

UNITED WAY CAMPAIGN TIMELINE

Year-round > **CONTINUE**

LIVE UNITED YEAR-ROUND.

Develop a year-round communication and engagement strategy

Do it for your employees, your customers, your investors or your community – no matter your motivation, everyone wins!

So Many Benefits

- Energize your employees by focusing your organization toward a common goal - building morale and teamwork
- Offer a simple, convenient, and efficient way for your employees to connect to their community and get involved with causes they believe in
- Provide information about services, enabling employees to use them for themselves, friends and families
- Build trust and increase goodwill among customers by giving back to the community

Engagement Opportunities

- Take advantage of Oshkosh Area United Way engagement opportunities ([LINK](#))
- Volunteer at Day of Caring ([LINK](#))
- Play or volunteer at the Golf to Give Charity Golf Outing ([LINK](#))

Save the Date

- Attend United Way events throughout the year ([LINK](#))

Other Ways

- Sign up for and share United Way monthly newsletters ([LINK](#))
- Encourage donors to connect with us on social media to see how their investment is changing lives ([LINK](#))
- Include our rack cards and brochure in new hire/retiree packets ([LINK](#))

We're Here To Help

Your United Way team is eager to help you make your campaign a success!



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ONLINE RESOURCES

Website – www.oshkoshunitedway.org

(includes campaign resources and information on United Way)

SOCIAL MEDIA

 [Facebook](#)

 [Twitter](#)

 [LinkedIn](#)

 [YouTube](#)