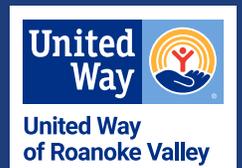


**IT'S A MOVEMENT.
NOT A MOMENT.**



Workplace Campaign Handbook



Welcome!

We want to start by saying Thank You!

Thank you for your support of **United Way of Roanoke Valley (UWRV)**, and our shared commitment to our community.

The role of an **Employee Campaign Manager (ECM)** is a crucial one. You are an agent of change and connection. Without you, we could not adequately reach as many as we do to tell the story of UWRV and the impact made by your co-workers' investment in our mission. The dollars raised this year will help thousands of people access services they desperately need to improve their lives. *You are vital to our success.*

We understand serving as an ECM is both a commitment of time and energy. Please know you are appreciated and valued!

We look forward to another year of mutual success and partnership as we stand **UNITED** for impact and change.

Sincerely,

A handwritten signature in cursive script that reads "Abby Hamilton".

Abby Hamilton
United Way of Roanoke Valley
President & CEO

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Contact Us

United Way of Roanoke Valley

325 Campbell Avenue, S.W.

Roanoke, VA 24016

Phone: 540.777.4200

uwrv.org



United Way
of Roanoke Valley

Workplace Campaign Support Staff

Alisha Childress

Vice President, Resource Development

540.777.4214

alisha@uwrv.org

Stephanie Hackett

Development & Engagement Specialist

540.777.4215

stephanie@uwrv.org

Austin Higgins

Development & Engagement Specialist

540.777.4217

austin@uwrv.org

Noah Thompson

Development & Engagement Specialist

540.777.4204

noah@uwrv.org

Terry Bridges

Vice President, Operations & Finance

540.777.4213

terryb@uwrv.org

Kianna Marshall

VP, Marketing and Communications Manager

540.777.4205

kianna@uwrv.org

Kyle Butto

Marketing and Communications Manager

540.777.4208

kyle@uwrv.org

Becky Dudley

Database Manager

540.777.4212

becky@uwrv.org

Our Socials



[@uwrvalice](https://www.facebook.com/uwrvalice)



[@UnitedWayofRoanokeValley](https://www.linkedin.com/company/UnitedWayofRoanokeValley)



[@UnitedWayRoanokeValley](https://www.instagram.com/UnitedWayRoanokeValley)



[United Way of Roanoke Valley](https://www.youtube.com/UnitedWayofRoanokeValley)

Professional Development

Thank you for serving as an ECM with the United Way of Roanoke Valley. We seriously cannot do this work without you! Your service goes beyond contributing time to help fundraise for the United Way and make a collective impact in the communities that we serve. In addition to your service, there are phenomenal benefits of volunteering that can enhance your professional development. Here are just a few examples below of your growth opportunities by serving with the United Way of Roanoke Valley:

1. **Networking** – Volunteering as an ECM will allow you to meet and connect with your fellow workplace members, as well as meet with other workplace ECMs and volunteers that partner with the United Way. Through networking, you can create lifelong personal and professional relationships while making an impact together!
2. **Learn or sharpen your skills** – There are several transferrable skills that can be learned and strengthened through serving as an ECM, i.e. planning, goal setting, project management, customer service, building team morale, demonstrating your creativity, event planning, and much more! This is a great way to flex and enhance your leadership and management skills.
3. **Increased visibility** – Serving as an ECM will put you in front of more people within your company and with others in the community! This may be the perfect opportunity to showcase your skills to management, influencers and others.
4. **Energizing** – Serving as an ECM can break up the monotony of your normal day-to-day job duties. It can be fun, relaxing, and rewarding. That energy and sense of fulfillment can carry back into the workplace and help to relieve work stress or tensions, freeing you up to continue being the best at what you do!
5. **Learn more about your community** – As an ECM, you will learn and be expected to share the mission and community impact of United Way in your local area! You will learn about various issues (i.e. early childhood education, family health strategies, and financial stability) and how we can work together to make a collective community impact. Become an UWRV advocate!
6. **Diversify your network and experiences** – Through volunteering with United Way of Roanoke Valley, you will work alongside a diverse group of people. You will work with people from different backgrounds (experiences, ethnic, cultural, workplace, geographic, etc.) and thus, gain and exchange perspectives and ideas!



What Does an Employee Campaign Manager (ECM) Do?

Your Role as an ECM

YOU are the key to a successful workplace campaign! As an ECM, you are uniquely positioned to bring United Way to your team. The more exposure your co-workers have to UWRV and our work in the community, the more your campaign will grow, with lasting effects. When you serve as ECM for your organization's campaign, you are joining thousands of other volunteers committed to making real change in our community.

Primary Objective:

Enable your co-workers to create a stronger community by planning, organizing and coordinating a successful UWRV campaign within your company.

We know that managing your company's fundraising campaign is a lot of work in addition to the job you do each day. Please remember that we are here to help you however we can in making your company's campaign a success.

Key Responsibilities:

- All ECMs should attend Employee Campaign Manager training each year. There are new updates and changes.
- Work with UWRV staff to develop an effective campaign plan
- Recruit and coordinate a team of volunteers to assist you
- Coordinate and attend kickoff and recognition events
- Promote the campaign throughout the company
- Encourage volunteerism among your co-workers
- Encourage leadership giving in your campaign
- Educate your co-workers about UWRV
- Make a gift yourself
- Invite everyone to give
- Thank your donors and volunteers
- Take your campaign to the finish line by turning in completed pledge forms and any reports as necessary
- Evaluate and make recommendations for next year's campaign



Timeline

The timeline below provides a suggested step-by-step campaign plan.

4-6 Weeks Before Kickoff

- Meet with your United Way staff representative
- Establish a Campaign Committee (i.e HR, IT, DEI, Community Engagement, etc.)
- Review/analyze last year's campaign
- Meet with and obtain senior leadership support of campaign - discuss corporate match, incentives, and special events (i.e. golf, corn hole, ping pong tournaments, raffles, PTO, personal leave)
- Determine type of campaign - Traditional, PDF, E-Pledge, Hybrid, Rollover
- Conduct campaign committee meeting to set goals, establish campaign timeline, plan events, and develop a Leadership Giving campaign
- Secure incentives and prizes (i.e. PTO, gift cards, party for department with highest participation, etc.)
- Review full menu of support opportunities (i.e. workplace campaign, sponsorships, volunteer engagement, special events)

2 Weeks Before Kickoff

- Recruit departmental "UWRV Champions" (if applicable)
- Acknowledge your leadership donors (is this a token, breakfast, etc)
- Work with UWRV staff to customize the standard pledge form (optional)
- Work with UWRV staff to set up and personalize E-Pledge (if applicable)
- Check campaign supplies (get with United Way staff to secure brochures, posters, stickers, and/or videos)
- Confirm all meeting arrangements with UWRV Champions and United Way staff
- Send Thank You cards/messages to prior campaign donors

1 Week Before Kickoff

- Begin campaign promotion (email, social media, samples found in campaign toolbox)
- Review campaign plans with departmental "UWRV Champions"
- Send CEO letter/email to all employees
- Hold your company leadership meeting (lunch or breakfast) to conduct leadership donor solicitation
- Place/Share your campaign flyer in shared spaces and in newsletters

Campaign Kickoff & Progress

- Hold employee kickoff meeting with CEO remarks, video and community partner speakers
- Publicize results of leadership campaign
- Visit each department/location to ask and encourage participation
- Continue to follow-up with each employee - 100 percent ASK!
- Report progress to employees
- Give away prizes and incentives in drawings for those who have returned pledge forms
- Submit any cash or checks for campaigns beyond 2 weeks

Campaign Wrap-up

- Conduct final meeting with Campaign Committee
- Put together campaign debrief notes (what went well, what needs to be adjusted, etc)
- Meet with CEO/senior leadership and report final results
- Announce final report to employees
- Thank and recognize contributors

Final Report

- Return pledge forms in the Reporting Envelope
 - Provide sweeps information to campaign manager
 - Send Donor Engagement Survey with thank you email to employees
 - Complete ECM survey
 - Submit final United Way campaign report to the United Way office
- *large campaigns submit weekly

11 Steps to Success

1. Become Informed

Being passionate and informed about United Way of Roanoke Valley will translate to your co-workers. They will come to you as a trusted source of information and guidance.

2. Involve your CEO and Upper Management

Participation of company leadership is essential for a successful campaign. Leverage their support in ways that can boost the credibility and importance of your campaign and efforts.

- Ask them to recruit and approve a Campaign Committee, Executive Sponsor or Champion.
- Verify the corporate gift or company match to encourage employee giving.
- Consider sponsoring or participating in a United Way event, such as Day of Action.
- Ask them to endorse the campaign during your presentations or with a letter to employees.
- Ask them to approve incentives or activities that can be used during the campaign.
- Attend special events
- Ask CEO or decision-maker to send a message to all staff for support of campaign, expectations, tone-setting

3. Form a Campaign Committee

Don't go it alone. In fact, the larger your workplace, the more important it is to recruit some help. The more people you have helping on your campaign, the more people you will be able to reach. It also means **LESS WORK FOR YOU!**

- Ask a friend at work to be your co-coordinator.
- Recruit people from all areas of your organization.
- Include people with United Way experience, if at all possible.
- Find people who are well-liked and respected by co-workers.
- Ask your team to help you plan, participate, and present.
- Recommend Campaign Committee:
 - Human Resources
 - Information Technology
 - Community Engagement
 - Giving/Philanthropy Committee
 - Communications



4. Develop A Plan

Be Prepared

Create a plan of action ([See Timeline pg. 4](#) for suggestions) ensuring all co-workers are educated about UWRV and are **asked to give**. This plan should include obtainable goals for your workplace to achieve ([See Campaign Worksheet pg. 15](#)) and ways to measure the success of your efforts.

- **Choose Campaign Format**

Select the type of Campaign that works best for your organization, with options including Traditional and PDF, E-Pledge, Rollover Campaign and Hybrid Campaign.

Page 10 of this document, [Additional Campaign Information](#), provides detailed information to help you make the best format choice for your organization. To see if any special event fundraisers might be right for your workplace, see the [Special Events \(pg.11\)](#).

- **Establish Campaign Dates**

The period of direct solicitation during a workplace campaign can vary from one week to a few months. Feedback and guidance from organization leadership is important in determining the correct length. However, it's important to know the campaign doesn't just "happen." Be sure to choose which of the best practices and fundraisers you will employ and prepare for them. Schedule UWRV and/or partner presentations in advance and plan the marketing efforts that will enhance your campaign.

Campaign/Giving season starts July 1 each year and ends June 30 each year. UWRV encourages companies to schedule their campaigns between July and December to allow for a full year employee payroll deduction.

- **Set a Participation Goal**

Set a participation goal! Review last year's number of employees and increase. Set a dollar amount goal by reviewing last year's gift and using the [Calculations Worksheet \(pg. 15\)](#) to set a realistic goal. Increasing participation is a great tool to help you reach your monetary goal.

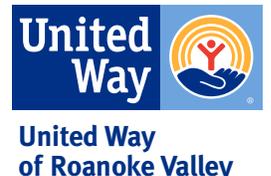
- **Set a Goal of 100 Percent Ask**

Make sure that everyone receives a pledge form or can access an online pledge form. The most effective way is through distribution of pledge forms and brochures during UWRV presentations at staff meetings. The number one reason people don't give is because they were never asked!

- **Set a Goal of 100 Percent Pledge Form Collection**

This ensures that everyone has at least considered a gift to UWRV and made a decision. It does not mean that they should be forced to give. Set a deadline for forms to be returned and ensure that all pledge forms, **even if not filled out**, are collected. Please keep complete forms and blank forms separate. They can be separated by paper clips.

WHEREVER YOU ARE IS THE ENTRY POINT.
JUMP IN AND LET YOUR GOOD DEEDS RIPPLE OUT.



5. Gather Essential Campaign Materials

Work with your UWRV Campaign Manager to determine what materials work best for your organization. A combination of brochures, letters, impact stories, posters, videos and/or speakers may be effective. Or, just using a singular item may have the most impact. Also, check out the toolkit at: <https://uwrv.org/campaign-toolbox>

IF EVERYONE GAVE...

IT'S EASY TO GIVE:

- Credit Card
- Payroll Deduction
- Cash
- Paypal: uwrv.org/make-us-united/
- Check
- Text "UWRV" to 85511

Number of Employees: _____

Donation: \$ _____

Dollars: \$ _____

Just ask _____ for more information.

www.uwrv.org United Way of Roanoke Valley

IT'S A MOVEMENT, NOT A MOMENT.

CHANGE DOESN'T HAPPEN ALONE. LIVE UNITED 2021

GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED

United Way of Roanoke Valley

UNITED WAY COMMUNITY CAMPAIGN

LOCAL ISSUES. LOCAL CONTRIBUTIONS. LOCAL RESULTS.

OUR GOAL

IT TAKES ALL OF US WORKING TOGETHER TO REACH OUR GOAL

United Way

LET'S GET SOCIAL!

Social Media Guide

We want to connect with you on Social Media! Please remember to tag and mention us on your company and individual social media pages. You can even send us photos or comments from your campaign and we will share them on our social media pages. Highlighted opportunities to share include your campaign events, campaign successes and volunteering with United Way. If you have not done so already, be sure to follow our social media accounts!

Quick Tips

Our Social Media Tags

- Facebook @UWRVVA
- Instagram @UnitedWayRoanokeValley
- LinkedIn @UnitedWayRoanokeValley
- Youtube - United Way of Roanoke Valley

Key Website Links

- www.uwrv.org
- www.uwrv.org/give
- www.uwrv.org/volunteer

Example Posts

- (Insert Company)** is proud to partner with @UWRVVA to build a stronger community. We're off to a great start in our workplace campaign! Our goal is to raise \$_____ #LiveUnited #RoanokeValley #SupportLocal
- Supporting the Roanoke Valley region is one of our core values at **(Insert Company)** and that's why we proudly support the United Way of Roanoke Valley (tag us). Learn more about United Way at www.uwrv.org
- Today is the official kick-off of **(Insert Company's)** United Way Campaign! Supporting our community is one of our core values and that's why we support the United Way of Roanoke Valley (tag us).
- Together we can make change happen! With @UWRVVA, we are tackling our region's greatest challenges in the areas of basic needs, education, financial stability and health. #LiveUnited
- We all win when kids succeed in school, when families have a stable income, when communities are healthy and when all of our neighbors have emergency access for services like food and shelter. That's why **(Insert Company)** partners with United Way of Roanoke Valley (tag us) to build a stronger community.
- What a great photo (upload an image of your campaign event) of our employees ramping up to give back! We're all learning up with @UWRVVA to create success stories for our own neighbors, customers, co-workers, friends, and families right here at home. To read stories worth telling visit <https://www.uwrv.org/get-involved/campaign-success>
- At **(Insert Company)** we give, advocate, and volunteer with United Way of Roanoke Valley (tag us) to improve our community. We are kicking off our United Way campaign with a goal of \$_____ raised! Learn more about United Way's work right here at home at www.uwrv.org
- (Insert Company)** is proud to launch our @UWRVVA campaign with a goal of \$_____ to help build a stronger Roanoke Valley! #LiveUnited
- (Insert Company)** employees support United Way of Roanoke Valley (tag us) in working toward a better community. Like to one else, United Way responds to the changing needs of our community and together we have the power to make the Roanoke Valley region stronger. Learn more about United Way at www.uwrv.org

United Way of Roanoke Valley

YOU'VE GOT MAIL

Email Messaging Guide

Sample Emails

Senior Staff Kick-off Email
Subject: Are You In?
 Our 2021 United Way campaign is kicking off! Join me in learning how gifts to United Way impact our community and create lasting change.
 United Way of Roanoke Valley works to address the most pressing issues facing our community ensuring families have opportunities and everyone can meet basic living needs.
 Giving to United Way is the best way to help the most people in need in our community. One gift of any size has the power to transform lives across the community when joined with the gifts of co-workers, friends, and neighbors.
 Thank you for caring about our community and supporting this year's United Way of Roanoke Valley annual campaign. Together, we have the power to create great change!
 Sincerely,
 (Senior Staff Name)

Employee Campaign Coordinator Email
Subject: Change Begins With You
 On (DATE), we will kick-off our United Way Campaign. Your gifts have the power to change the world, right here at home through this campaign. Last year, we raised (AMOUNT) to assist United Way of Roanoke Valley in addressing some of our region's most pressing problems. This year, we are aiming even higher, as the need for services is even greater in what has been a difficult year for so many people.
 This is a great opportunity for you to get involved in building the strongest community possible. I will be contacting you soon with more details. Thanks in advance for your participation because **Let's all LIVE UNITED!**
 Learn more about United Way at www.uwrv.org

United Way of Roanoke Valley

TODAY DETERMINES TOMORROW **act! now.**

WHAT IT MEANS TO LIVE UNITED

Children can succeed in school. Kids and families are healthier. Households are financially stable.

ONE INVESTMENT IMPROVES: HEALTH EDUCATION FINANCIAL STABILITY. These key areas are the building blocks necessary for a better, more sustainable, quality of life for all.

HOW WE LIVE UNITED: 99% of funds designated to the Impact Fund stay in the Roanoke Valley region. 10,416 number of people our dollars impacted in the Roanoke Valley Region last year.

40+ Partner Agencies. 42% of who we serve are children.

WAYS TO INVEST: donate online, write a check, payroll deduction, text "UWRV" to 85511, pledge to be billed, stocks & investments.

LIVING UNITED starts with **Y**

325 Campbell Avenue, S.W. Roanoke, VA 24016 540-777-4200 info@uwrv.org

www.UWRV.org
 The 2021 Campaign for United Way of Roanoke Valley

United Way of Roanoke Valley



United Way of Roanoke Valley

6. Hold Employee Meetings

Make the Ask

- People give to people. The most effective “asks” include an education piece along with the human element, the personal touch of a face-to-face plea. At the very least, include a story, an e-mail, or a letter explaining why their gift is needed.
- Ask for a completed pledge form from every employee. Whether they give or not, if they fill out the form, we know they’ve been presented with the information and have made a conscious decision to participate.

Let Us Do It for You

- Find the time to schedule a 10-minute United Way presentation. This could occur during already scheduled staff meetings.
- The advantages of holding a group meeting:
 - Our statistics show workplaces that invite United Way in to do a formal presentation for members consistently raise more money than those that do not.
 - The positive spirit and educational approach of the group meeting fosters a greater spirit of giving in a greater number of people.
 - The United Way message is presented in a consistent manner to the workforce.
- We can do presentations for as few as five people or as many as 1,000, tailoring it to the company’s philanthropic priorities.
- Presentations can include the following elements:
 - New messaging about United Way’s strategic work in our community
 - A PowerPoint presentation
 - Virtual meeting format

7. Best Practices

Below is a list of “best practices” that have been used in most companies running successful United Way campaigns. You can find more ideas and details in our [online campaign toolbox](#).

- **Communicate year-round**
- **Incentives**
- **Thank employees “outside” campaign time**
- **UWRV newsletters, website and social media**
- **Facts of the month**
- **Volunteer opportunities**
- **Share UWRV success stories**
- **Don’t do it alone**
- **Signature events**
- **100% Participation**
- **100% Ask**
- **Leadership tone-setting**
- **Special Events**

8. Follow Up

- Ask every employee to return the pledge form whether they give or not.
- Have committee members follow up with those who attended meetings but did not return a pledge form.
- Designate a committee member to solicit anyone who did not attend a meeting, including those who were on vacation, medical leave, part time staff, remote workers, etc.

9. Report Results

Communicate your campaign results to your entire organization as you move along. Follow the campaign wrap-up procedures required per your campaign type.

- **Traditional and PDF campaigns, and any cash or check donations**
 - Prepare campaign Report envelope. Summarize all campaign information on the report envelope. Enclose cash, checks, and original pledge forms. Be sure we have enough information to recognize your employees for leadership giving.
 - Establish an envelope pick up date(s) with UWRV.
- **E-Pledge campaigns**
 - Coordinate with your UWRV staff member to provide a transaction report to your company's payroll department.
- Ensure that all non-payroll deducted pledge forms are submitted by the end of the calendar year to ensure employees receive their tax receipts.

* For more detailed close out procedures and an example of a completed Report envelope, [see Campaign Close-out procedures pg.13](#))

10. Sweeps

Sweeps is the process of the Development & Engagement Specialist reviewing donors that gave in the previous campaign year but did not give during the current campaign year. The goal is to identify these lapsed donors and to connect with them to share and additional opportunity to make a financial contribution during the current campaign year. The Sweeps process begins after the company's campaign end date. ECMs should expect communications with their respective UWRV Development & Engagement Specialist to complete this process.

Once the Development & Engagement Specialist has identified the list of lapsed donors, he or she will work with the ECM at each company to learn more information about the lapsed donors, i.e. employee is no longer with the company, retired, employee was on leave, etc. Based on feedback from the ECM, the Development & Engagement Specialist may contact the lapsed donor to make the ask for a current campaign year gift!

11. Say "Thank You"

Saying "thank you" may be the most important element in maintaining the long-term support you've worked so hard to achieve. While UWRV has a number of ways in which we thank donors, we would like your help to thank donors internally for their participation. Just a small token of appreciation is often enough to convey the message. Here are some ideas:

- Hold a special employee meeting to announce and celebrate your results
- Ask the CEO to send a letter to all givers
- Use blanket bulletin boards, lunchroom and employee communications with messages of appreciation
- Print half-sheet thank you's on colored paper with the UWRV logo and your thank you message Post them on the cubicles of those who pledged, recognizing them for their generosity
- Late afternoon reception with snacks for all those who gave
- Thank your committee members with a special meeting, individual thank you notes or a special note from CEO

Additional Campaign Information

More Information

If you need help choosing your campaign path or have questions, please reach out to your Development Engagement Specialist.

Campaign Types

Traditional

A traditional United Way campaign uses paper pledge forms provided by your Development Engagement Specialist. These forms have small areas that can be customized to meet your company's needs. We typically add your logo to each pledge form, but can also add: previous donor gift amount, raffle information, and/or pre-print the donor name and address. We then deliver these pledge forms to you for distribution to employees and will come back to collect them and donations after your campaign.

PDF

PDF campaigns allow donors to complete a fillable PDF form. Donors will then need to complete and save the fillable PDF form and then email it to the ECM. The ECM is then responsible for compiling the forms and preparing the donor information, as well as sending the batch of PDFs to the Development and Engagement Specialist.

E-Pledge

An e-pledge campaign is the digital version of a traditional campaign. It provides the same options of giving and customization that a paper pledge form provides. E-pledge is useful for companies who have employees that are out of the office or on the road for their jobs. It is an easy and secure way to make sure all your employees have the opportunity to give. The e-pledge has a landing page for giving that can be customized with your campaign information or we can provide a generic statement. There are two main ways to run an e-pledge campaign:

Personal Link – For the personal link we ask that the ECM provides us with an Excel file with employee names and email addresses (employee ID is helpful, but optional). We then send a personal, secure link to each employee directing them to the company landing page to make their donation or view their giving history.

Company Login – For the company login we can provide the ECM with a link to the landing page and a company login (Username: ABC LLC, Password: ABC2020) for all employees. The ECM can then send the link through their internal email system and each employee will login with the company username and password to enter the landing page.

We can also provide an administrative login for the ECM or multiple contacts for each company that will provide a dashboard for campaign results and reports.

Rollover Campaign

A rollover campaign can be helpful for companies going through transitions in the workplace. In a rollover campaign the donor is asked if they wish to rollover their gift amount from the previous campaign and continue giving. We can provide the ECM with a list of donors and their donation amount to verify with each donor. The ECM would then return the file back to us of those donors who chose to extend their gift.

Hybrid Campaign

A hybrid campaign uses the best of both worlds, digital and paper. If you have previously run a traditional campaign, this might be a great way to ease into using e-pledge. We can provide you both paper forms for employees and an e-pledge link for email. Hybrid campaigns can be useful for:

- Companies that have employees that are on and off site. It gives the company the ability to make sure all employees have the chance to give, no matter where they are located.
- Companies that are wanting to transition from paper to digital can use a hybrid campaign to help employees ease into a digital format.
- Companies where not all employees have access to email or would not be comfortable with a digital giving platform and prefer paper.

Campaign Timelines

The campaign season begins July 1 and ends June 30 each year.

For all campaigns, we ask for at least a week after providing files (employee names, emails etc.) to have forms printed or landing pages ready.

After campaigns, if you need an employee payroll file or reports we ask for at least a week lead time before your deadline.

Special Events

Including one or more special events in your United Way Campaign can help motivate and promote team spirit, raise awareness and money. Special events provide co-workers with another way to support the campaign while participating in fun activities. Popular events include activities such as chili cook-offs, basket raffles, donations for casual dress day and cornhole tournaments. Money raised through campaign special events is included in your campaign total. For more information regarding campaign special events, see our [campaign toolbox](#).



Running a Virtual Campaign

Virtual Kickoffs

We strive for face-to-face interaction with all of our workplace campaigns each year. Sometimes that isn't possible, in which case we're ready to take things virtual. Just because we can't be face-to-face doesn't mean we can't have fun and celebrate the giving spirit of our workplaces and our community. We are happy to provide a virtual kick-off experience for you through Go To Meeting, Zoom, or any virtual platform that works for your company. We are also happy to continue year-round support through virtual lunch and learns, webinars, or guest speakers. Your UWRV Campaign Manager will be happy to help you plan and design what a virtual experience looks like for your company, just reach out!

E-Pledge

E-pledge is a digital format for giving to the United Way of Roanoke Valley and a safe way of getting the information out about your campaign. E-pledge provides a "hands-off" approach to spreading the word about supporting your community through the United Way. [Refer back to page 10 for more information.](#)

Virtual Fundraisers

We look forward each year to the creative and fun special event ideas that our ECMs and workplaces come up with to support their campaigns. They are always fun engagement pieces for employees and great ways to increase your campaign numbers for the year. Many of our sister United Ways and other non-profits have already found innovative ways to continue special event fundraising and keep their community involved. We are happy to provide, plan and help implement these virtual events with you!

Digital Materials

We have always had a great mix of digital and printed materials for our workplace campaigns, and we will continue to offer the platform that works best for you and your company. However, staying in line with safety guidelines we are making sure that we have a great digital library of materials that you can use during your campaigns. Whether it is a flyer, poster, brochure, or video, we want to provide the best source of information on what we are doing in the community and how you can help.



Campaign Close-out Procedures

Campaign Report Envelopes

Here is a quick checklist for completing the report envelope. Please complete reporting envelope each time you submit pledges and cash/checks. If you have additional questions, call your United Way Campaign Manager.

- Report results quickly to United Way of Roanoke Valley
- Fill out report envelope completely, including signature and date
- **DO NOT MAIL.** Call your United Way staff at (540) 777-4200
- All pledge forms must be signed by the employee making the donation
- Include all cash and checks with signed, original pledge forms
- Summarize the total pledges
- Submit a signed pledge form and check for corporate gifts (if applicable)
- Submit all pledge cards with designations by calendar year-end to ensure designations are honored
- Include funds raised from special events as applicable
- Provide requested sweeps information

***See following page for a completed sample envelope**

E-Pledge Close-out

The Pledge Transaction Report is the report that most ECMs use. This report shows the amount and type of every pledge that employees have made and can be exported into a format that easily imports into your payroll software.

Work with your UWRV staff member to determine:

- Who will prepare the report
- What format the report needs to be in
- Who will email the report to and the payroll representative's email address



EMPLOYEE CAMPAIGN REPORTING ENVELOPE

Please fill out the information on this sheet in its entirety for each envelope you return to United Way. If you have questions or need more original pledge forms, please contact your UWRV staff person. Thank you for all your effort and hard work this year with your campaign!

CORPORATE

If your company is giving a corporate gift, please complete a corporate pledge form as well as indicating the amount on the line below.

EMPLOYEE GIFTS

These are employee pledges that are any type other than payroll deduction. Please paper clip cash and checks to each pledge form.

EMPLOYEE PAYROLL DEDUCTION

These are employee pledges by payroll deduction only.

WORKPLACE SPECIAL EVENT

These can be bake sales, penny wars, or other fundraisers the company held. Please fill out a blank pledge form with "Special Event" written in the name section, the total from the event in the "Total Pledge" line, and check the "SE" box in the far bottom right corner of the form.

PLEASE LIMIT TO 50 PLEDGE CARDS PER ENVELOPE

REVIEW CHECKLIST

- Include all original (not photocopies) pledge forms
- Separate your pledges by:
 - Payroll deduction
 - Cash and checks
 - Credit card, direct bill, stock
- Include corporate pledge form
- Keep special event money separate from pledge money
- Paper clip cash and checks to pledge forms
- Include number of employees
- Check forms for completeness

Company name Spacely Sprockets Number of employees 523
 Person completing this form George Jetson
 Phone number for contact 555-555-1234
 Payroll start date 1-1-2021 Payroll end date 12-31-2021

	# of Donors	Total pledge amount	Payments enclosed <small>Cash and checks only</small>
Corporate pledge	N/A	\$ <u>600.00</u>	\$ <u>600.00</u>
Employee gifts <small>(cash, check, direct bills, stock, credit card)</small>	<u>200</u>	\$ <u>10000.00</u>	\$ <u>10000.00</u>
Employee payroll deduction	<u>100</u>	\$ <u>5000.00</u>	N/A
Workplace special event	N/A	\$ <u>300.00</u>	\$ <u>300.00</u>
Campaign total	<u>300</u>	\$ <u>15900.00</u>	\$ <u>10900.00</u>

Retiree pledges _____ \$ _____ \$ _____

For companies that solicit retirees, please **do not include** in totals above.

ECM Signature George Jetson Date 10/30/2020
 RM Signature _____ Date _____

DEVELOPMENT

Account No. _____ Verbal _____ Campaign Year _____
 Date sent to Finance _____ Initials _____ SAP _____

Campaign Worksheet

Company Name:

Workplace Campaign Dates:

Corporate Social Responsibility/Community Involvement Focus:

Campaign Goals: (\$/Participation %)	Strategy:	Action Plan: (What to Do)
<p>1.</p> <p>2.</p> <p>3.</p>		
<p>Campaign Committee:</p> <p>Executive Champion(s):</p> <p>ECM(s):</p> <p>Committee Members:</p> <p>United Way Staff:</p>	<p>Five Steps to Calculate your Company's Investment Potential:</p> <ol style="list-style-type: none"> 1. Calculate your company's total dollar potential using one of these two formulas: <ul style="list-style-type: none"> • (Total Payroll) x .01 = Total Potential • (Average Annual Wage) x .01 x (Number of Employees) = Total Potential 2. Amount raised last year = 3. Percent of total potential achieved = 4. This year's goal = 5. Percent of potential goal = 	

Campaign Appreciation Awards

At the end of every campaign, UWRV extends its appreciation for all of the time and effort that goes into running a workplace campaign.

ECM of the Year

An Employee Campaign Manager is a very special individual. They are an employee volunteer who takes on the added responsibility of running their organization's United Way Campaign. The ECM of the Year is someone who takes their United Way Campaign that extra mile. They use the opportunity to build their leadership, workplace engagement and their community. Each year we chose an ECM who brings that extra bit of spark to their organization's campaign by providing volunteer experience, special events, education, community engagement, and so much more.

ECM Hall of Fame

This award recognizes the service of ECMs who return to run their organization's United Way Campaign year after year. Though their longevity is impressive, their effort and commitment to the United Way is the perfect model for what it means to Live United. Their enthusiasm and love for their community makes them a shining star in their organizations and to us.

Impact

This award focuses on the organizations and individuals that are strong advocates for the United Way Impact Fund. The Impact Fund provides the discretionary resources that drive our investments in critical, life-changing programs across the Roanoke Valley. This support allows our volunteers to dive deep into the needs of the community to implement strategies and actions that create lasting change. The Impact Fund are the dollars that United Way is able to leverage into ten times the impact in the community.

Shining Star

We often refer to this group of people as "boots on the ground." They are the organizations that provide direct services to our community, running the programs our workplaces and donors support. At United Way, we know how special and vital these organizations are to serving our community, and we simply could not thank them enough. This award recognizes a Community Impact Partner that has gone the extra mile and strives to continually give back to their community and the "boots on the ground" work that help lift up our Valley.

Spirit of the Community Award

Each year, this award recognizes a company exhibiting outstanding year-round support of not ONLY United Way, but their community as a whole. This organization prides itself on being a part of its community through corporate giving and sponsorship, leadership, supporting community events, volunteerism and showing a year-round presence in the community-building activities.

Community Builder

This award recognizes the company that has shown outstanding support, best practices, engagement, volunteering, and advocating for United Way and its partners.

Lead United

Recognizes a very special individual that leads their peers and employees not only in the daily work, but also in the importance of supporting their community. This person sets an ideal example of how to advocate for United Way.

Distinguished Service Award

The most precious resources that we have is time. The Distinguished Service Award recipient is someone who gives support, a voice and their time to the needs of United Way and their community.

LIVE UNITED[®]

325 Campbell Avenue, SW
Roanoke, VA 24016
Tel: 540.777.4200
www.uwrv.org



United Way
of Roanoke Valley