



The United Fund of Surry

Workplace Campaign Guide 2023-2024



www.unitedfundofsurry.org
336.789.3087

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A Note from the Executive Director



Melissa Hiatt

Thank you for committing to serve as your organization's Employee Campaign Champion for your United Fund of Surry's 2023-2024 Campaign. You represent some of our most dedicated volunteers in our community. We are so grateful you have chosen to serve in this role.

Over the last year, our community has experienced tremendous challenges. The United Fund has worked to help people in our region keep food on the table, find stable employment, succeed in school and much more. This wouldn't be possible without partnerships with employers who understand the importance of supporting their local United Fund.

As a Champion, you will help us build the bridge between your colleagues and the work our agencies provide. You are leading and shaping your organization's Workplace Campaign to best fit your company.

Remember, we are here to help. This guide, along with United Fund staff will help your campaign run smoothly, while making it fun and engaging for everyone involved.

Again, thank you for answering the call to lead!! Let's get started!

Sincerely,

Melissa



2023-2024 Campaign Cabinet Chairperson

Traci George

I was honored when asked me to serve as the 2023-2024 UFOS Campaign Chair! We believe in our commUNITY and with UNITY we can amplify our efforts and make a lasting impact to the 26 agencies we support.

Whether you are a long-time supporter or just learning about our mission, your involvement is crucial. There was a chant my volleyball coach taught me in college and today I continue to use it.

“We are ONE! We are ONE! Nothing can stop us when we are ONE! I challenge Surry County to lock arms and let’s make a difference together.

Woop Woop *Traci*



HOW TO

Run A Workplace Campaign

1 PREPARE

2 INSPIRE

3 ASK

4 Wrap- Up



United Fund of Surry

1

PREPARE

HOW TO GET STARTED



Talk with the United Fund. We are here to help!

The most effective Champions work closely with United Fund staff and are readily able to share information about United Funds local work with their colleagues. We would love to get you up-to-speed on our newest initiatives and help you come up with fun and engaging ideas for your campaign.



Secure support from top-level management.

The most successful campaigns have strong support from the highest levels of leadership. Meet with your senior leadership and confirm their support of the campaign. Map out any places where you'll need their specific involvement, such as having them send out an email to staff to encourage supporting the campaign. Make sure they know about campaign dates and goals and be sure to ask about any corporate gifts or company matching programs for employee gifts.



Recruit your team.

Create a team large enough to help you manage your campaign. Ideally, campaign teams should include employees from a variety of levels and departments. This will help lighten your workload and increase participation across the organization!



Organize a leadership giving program.

Learn more about United Fund's giving levels. United Fund has a dedicated leadership staff available to help brainstorm ideas for soliciting gifts of \$1,000 or more. Recruit a Committee to plan activities and share responsibilities.



Set a campaign goal.

Your colleagues will likely want something to strive for, so set a goal for them to reach! If you ran a campaign in previous years, look at the numbers and think about what you can achieve. Ask senior leaders if you can offer incentives to employees for hitting the goal, such as a paid day off or a catered celebration lunch.

UNDERSTANDING YOUR ROLE AS EMPLOYEE CAMPAIGN CHAMPION

As an Champion, your role is to plan, coordinate, delegate and implement a successful United Fund campaign for your colleagues.

As the ECC you are responsible for:

- Developing a campaign timeline with your United Fund representative
- Serving as the organization-wide leader of your campaign
- Coordinating the overall execution of the campaign plan
- Arranging all campaign meetings
- Monitoring and reporting campaign results in a timely and accurate manner
- Working with your campaign team to ensure everyone understands their roles
- Thanking all colleagues who become involved with the campaign
- Evaluating your campaign and making recommendations or plans for next year

RECRUITING YOUR CAMPAIGN TEAM

A team of campaign volunteers will not only make your job easier, but it will also increase the success of your campaign. The size of your team depends on the size of your organization. Below are our suggested roles and responsibilities but remember – you can adjust based on what will work best for your campaign.

SHARING UNITED FUND'S MISSION

United Fund of Surry has a wide portfolio of work across our county. It can be tough to succinctly explain why it is so important for your colleagues to support the campaign while helping them understand the impact their support has on our community. Here are some quick ways to share why donating to United Fund matters. And remember...we are here to help!

Make it personal.

Everyone has experienced adversity somewhere along the Steps to Success. Whether you or someone you know struggled in school, has dealt with financial hardships or had difficulties meeting their basic needs – these are all circumstances that arise as we move through life, particularly depending on the support systems we have in place. Think about someone you know who may have struggled in one of these areas. Maybe your parents are getting older and thinking about their health? Or maybe you have a neighbor who recently lost their job and is struggling to stay afloat financially? These are examples that you can share to help make your presentation personal.

Connect the dots.

United Fund works directly with agencies. We offer grant assistance. Leadership training. Planning for Marketing and Fundraising for all our member agencies. Financial support is important, but the foundation of a strong agency comes with strengthening leadership skills and abilities.

Share the impact.

Without a unifying force in our community looking at the data behind these issues, developing solutions and ensuring donor dollars are spent effectively, many people in our region would not receive the help they need. United Fund is here to support and uplift those who need help the most and it starts when each donor decides to give to this important work.



CAMPAIGN KICK-OFF

A campaign kick-off is a company-wide event or meeting to educate and inspire your colleagues about giving back to their community through United Fund, with an element of fun. Every campaign kick-off is different. Some larger companies, like Insteel, host a campaign kick-off that doubles with a BINGO game. Some smaller companies, host a breakfast meeting where they invite speakers to present about United Fund's mission. Your kick-off should be tailored to your organization and what best suits your needs.



SHARE THE ENTHUSIASM

✔ Volunteer Opportunities

Engaging employees in volunteer opportunities will allow them the opportunity to directly connect with United Fund work. If you are interested in setting up a volunteer opportunity for your organization, please contact your United Fund representative.

✔ Promotional Opportunities

We're here to help!

United Fund has materials available for you to promote your campaign, including:

- Posters and Flyers
- Template email messages
- Informational materials about our work in specific areas
- Pop-up banners for decoration at events
- And more!

✔ Custom Promotional Materials

Many organizations like to develop their own materials to promote their campaign. We think that's great! Talk to your United Fund representative to brainstorm ideas and see where we can be helpful.



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ASK

People do not give if they are not asked. It is important to directly ask your colleagues to donate to United /Fund throughout your campaign. Your ask may come in multiple forms – in person, during events or through email.

MAKING THE ASK



Talk to your United Fund representative.

We are available to help you come up with the best strategy for making your ask.



Get their undivided attention.

Schedule a time to your colleagues at a meeting or kick-off event and ask them to participate in your campaign with a donation.



Tell the United Fund story.

Come prepared with reasons why people should give to United Fund. If you would like to invite a United Fund representative to tell the United Fund story, please let us know and we can send a speaker.



Explain how to give.

As the Champion, you can determine which giving platform will be used. You are responsible to tell people where and how they can donate. There are a couple of options to choose from. Keep in mind, if you work for a larger parent organization, your company may have already determined the giving platform to use. Check with your contacts at your parent organization to find out.



Address concerns and questions.

Your colleagues will have questions. If you need assistance with questions please contact the United Fund, we are here to help you. We want you to feel confident and want participants to feel confident in giving to the United Fund.



Be direct!

It is easy to do all the things listed above and still forget to make a direct ask. Make sure you are clear and direct when asking your colleagues to give. United Fund representatives are available to help during the planning or execution of your campaign. We know it can be especially difficult to ask for donations and we are here to make that process as easy as possible. If you would like suggestions, tips or for a speaker to make “the ask,” please let us know.

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ASK

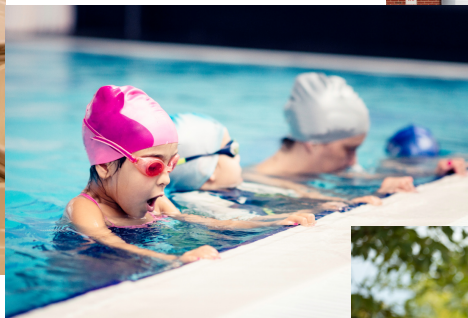
Can I designate where my donation goes

Yes, The United fund of Surry supports multiple member agencies. Your pledge form list those member agencies and you may choose where your money is given.

What type of services are funded?

The United Fund of Surry has four focus areas:

- Youth & Families
- Seniors
- Crisis Intervention
- Medical Intervention



WRAP-UP

After thanking your employees, there are a few things left to do.

REPORT results

Collect All Gift Information

Look over paper pledge forms to ensure everything looks correct.

Schedule time for your United Fund representative to pick up forms and materials you used during your campaign.

PLAN ahead

Take a deep breath, then get a head start on planning for next year.

Gather feedback about the campaign from senior leadership, your campaign team and your United Fund representative. Talk about what worked and what didn't and start a conversation about what next year's campaign will look like.

Save all relevant notes and resources in an easy-to remember place for volunteers to use next year.

Identify next year's Champion and make a formal introduction between the new Champion and your United Fund representative.

STAY involved

United Fund has events and opportunities throughout the year, even when campaigns are not running. Here are some ways to stay involved and updated

Volunteer to serve on a United Fund committee

Participate in a United Fund Fundraiser

Hold a 3rd Party Fundraiser for the United Fund of Surry.s

FREQUENTLY ASKED QUESTIONS

How long should a workplace campaign run?

The average campaign runs for one to two weeks, which is usually enough time to kick off your campaign, effectively promote United Fund and make your ask without overwhelming you colleagues. Keep it simple!

When should our workplace campaign take place?

Most campaigns run between August and November, so that you may begin payroll deductions in January. But it can happen at any time that is best suited for your organization. Campaigns must complete by March 15, 2024.

How can employees give?

The easiest is payroll deduction through the campaign, however they may mail a check or give online. Post Office Box 409, Mt Airy, NC 27030 or www.unitedfundofsurry.org/donate

When does payroll deduction start?

Payroll deduction typically runs from January 1 through December 31. However, United Fund does not set your payroll schedule. It is a decision made within your organization.

How do I work this into my schedule?

The best way to run a campaign without being too overworked is to recruit a committee and delegate. Work with your United Fund representative and let them know your limitations. This will allow you to come up with a plan that fits both your organization's needs and your busy calendar.

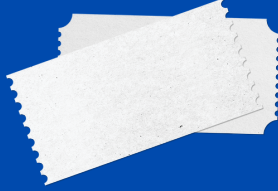
Can my colleagues designate their donation?

As a service to donors, we make it possible to designate your donation to a program or other 501(c)3 agency. However, the direct investment of your gift to United Fund will make a profound impact on our community. Instead of addressing just one issue, we are working to address some of the biggest needs in our region. Your dollars given directly to United Fund enable us to do research about important issues in our region while also working with organizations that are making a difference in these areas.

When You Give A Little Your Community Gets A Lot !



For \$25 you
can take someone
out to a **movie**.



For \$50 you can
buy at least one
video game.

OR

OR



You can provide
**personal hygiene
supplies**
for a homeless
family a month.



Provide
**food and
shelter** for
one
person for
a day.

For **\$100** you can
buy a months
worth of **coffee**.



OR

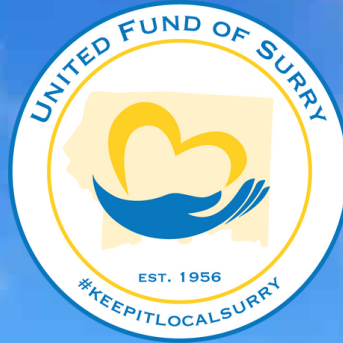


Provide
counseling for a
family in crisis for
a month.

Give at www.unitedfundofsurry.org

336.789.0837

THANK YOU
FOR RUNNING
A CAMPAIGN
TO SUPPORT
the citizens
of Surry County



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