



United Way of San Antonio
and Bexar County



2022 CAMPAIGN GUIDE



STEPS TO A SUCCESSFUL CAMPAIGN



United Way of San Antonio
and Bexar County

STEP 1: BUY IN

Your first step is to work with your CEO to establish a top-level team. Support from the top demonstrates to employees your company's firm commitment to the campaign. Get your CEO to endorse the campaign by:

- + Determining a corporate gift
- + Making a personal leadership gift
- + Approving formation of a campaign committee
- + Promoting leadership contributions
- + Endorsing campaign communication
- + Appearing at campaign functions



Brittany - San Antonio, TX

STEP 2: PLAN

Pre-Campaign Activities include:

- + Meet with your CEO to obtain visible support for your campaign – Ask for an executive chair to help promote the campaign. *(A corporate match on employee dollars is a great way to incentivize a donor's pledge.)*
- + Meet with your United Way Representative
- + Set a challenging, yet attainable goal
- + Form a campaign committee to assist you
- + Plan campaign dates and special activities
- + Create a communication plan for informing employees about campaign activities

Campaign Activities include:

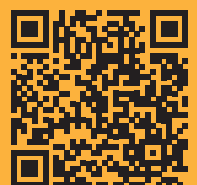
- + Conduct a leadership giving program
- + Have a kickoff event *(virtual or in-person)*
- + Send out reminders for upcoming campaign activities
- + Ask every employee to participate by making a donation – Remember to include new hires and retirees

Post-Campaign Activities include:

- + Recognize and thank the Campaign Committee
- + Send a thank you note to all donors
- + Plan year-round United Way activities *(your United Way Representative can assist with this)*

QR CODE CAMPAIGN TIP #1

Visit our Campaign Toolkit or contact your United Way Representative for additional information, planning materials, campaign ideas and information.



STEPS TO A SUCCESSFUL CAMPAIGN



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STEP 3: EDUCATE

Become advocates for United Way and educate others about our work in the community. Share why you support United Way and if you know any coworkers that United Way has helped, ask them to share their stories.

- + Share community data provided by United Way
- + Utilize the email template messaging from the [Campaign Toolkit](#) to inform employees about United Way
- + Plan a volunteer (*virtual or in-person*) activity to educate employees
- + Work with your United Way Representative to schedule an opportunity to visit an Impact Partner program

STEP 4: PROMOTE

Promote Leadership Giving

One of the most effective ways to grow new dollars for your campaign is by increasing leadership giving.

- + Plan a special event to promote leadership giving
- + Have CEO recognize leadership donors
- + Provide employees with leadership giving information

Promote Your Campaign

Start building excitement about your campaign and promote your campaign goal.

Methods for promoting a campaign:

- + Share data, stories and prepared posts on social media from the online [Campaign Toolkit](#)
- + Send emails to employees about upcoming events and special activities planned
- + Provide regular updates to employees about the progress of your campaign
- + Send out calendar invites for campaign events and use the United Way virtual background for your next online meeting

STEP 5: THE ASK

**THIS IS THE MOST IMPORTANT PART OF YOUR ROLE
AS AN CAMPAIGN LEADER!**

The number one reason given by people for not participating in a campaign is because they aren't asked – which makes your role very important for making sure that all employees are asked to participate and make a donation. Here are the two best methods for making the ask:

- + Personal – The one-on-one ask is often the most effective and allows you to educate employees about United Way and answer any questions they have.
- + Group or Department Meetings – Plan small meetings (*virtual or in-person*) so that they can learn about United Way. Make sure you invite your United Way Representative or Loaned Executive to participate.
- + You Can't Do It Alone – Assign department leads to help ensure everyone has the opportunity to participate.

STEP 6: RECOGNIZE

At the end of your campaign make sure that you recognize and thank all employees and volunteers for their support of United Way and our community.

- + Email
- + Hand-written notes
- + Thank You reception or breakfast

STEP 7: CELEBRATE

Celebrate your campaign and plan year-round United Way activities to make donors aware of the impact of their gift.

Your United Way Representative can assist you with planning engagement activities.

QR CODE CAMPAIGN TIP #2:

Check out impactful stories of our work in action. Everyday, our work impacts people in our community. Find a story and share it with your team or department.



CAMPAIGN ENGAGEMENT IDEAS



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KICKOFF

- + Record a video from a senior executive to be distributed electronically to all employees. United Way speakers are also available to talk about the impact of gifts made to United Way of San Antonio and Bexar County.
- + Host an in-person kickoff event or include the event at the end of an existing meeting.

UTILIZE AVAILABLE RESOURCES

- + The Workplace Campaign Toolkit is available online at www.uwsatx.org/campaign-toolkit. This toolkit includes sample email messaging, video links, PDFs of collateral materials and more.
- + Your United Way Representative can guide you through all steps of running a digital campaign as well as help you set goals, train your teams and more.
- + Need something that is not available in the Campaign Toolkit? Ask your United Way Representative.

COMMUNICATIONS

- + Consolidate and coordinate outgoing communications to avoid overwhelming employees.
- + Promote any corporate match, corporate gifts or other incentives to increase contributions.
- + Have your Campaign Committee make individuals asks of their team. If possible, make it personal. Consider phone calls instead of emails. People give to people.
- + Leverage your United Way Representative to assist with creating impactful messaging about our work.

EVENTS

- + Encourage employees to participate in volunteer opportunities on their own or as a company.
- + Work with your United Way Representative to identify additional event opportunities.

- + A complete list of volunteer opportunities available can be found at www.volunteersanantonio.org.
- + Find opportunities to create engaging events: host a kickoff for employees to hear from company and campaign leadership, have a silent auction with prizes like gift cards or lunch with the CEO, or have a day of impact.
- + If possible, consider having smaller department events once the campaign is launched to promote donation options or add as an agenda item to an existing meeting.
- + Popular events include dress down days, silent auctions and t-shirt sales. Your United Way Representative can provide you details or additional events that might fit into your campaign.

LEADERSHIP SOCIETIES

- + When asking for donations, remember that United Way Leadership Societies are a way for employees to extend their impact and deepen their engagement with our work. Based on their giving level, employees can join the following Leadership Societies and take part in meaningful, year-round events, volunteer opportunities and engagement.
 - + Tocqueville Society (\$10,000+)
 - + Briscoe Society (\$5,000 - \$9,999)
 - + Bejar Society (\$2,500 - \$4,999)
 - + Tejas Society (\$1,000 - \$2,499)
 - + Alamo Society (\$500 - \$999)

RECOGNITION AND THANKS

- + Send thank you e-cards from your CEO, Campaign Chair, Campaign Co-Chair, Campaign Coordinator or other team members.
- + Send personal thank you notes to each of your campaign committee members.
- + Highlight donors of a certain level on a team call or monthly e-newsletter.
- + If possible, host an event (*virtual or in-person*) for donors who give at a certain level. Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet.

MAKE IT S.O.C.I.A.L.



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S SHORT AND SWEET

- + Campaigns are best when kept to 2 weeks or less. The longer the time, the less momentum.

O OUTSTANDING GOALS

- + Clearly state your goals – dollars raised, number of participants, average donation and volunteer hours.

C CELEBRATE PROGRESS

- + Celebrate your wins! Keep momentum going by celebrating daily wins and keeping the progress of the campaign at the top of all communication.
- + Use the goal thermometer template in the online toolkit to share progress.

I IMPACT MATTERS

- + Use photos or videos when possible in your communication and storytelling. This helps connect people to the mission.
- + Promote and encourage leadership giving for maximum impact.
- + Provide impact equations – what does my donation do at various levels?
 - + \$3 a week provides 16 literacy kits to inspire creativity among students and deepen children's reading experiences.
 - + \$20 a week provides 104 grocery carts of food for local individuals and families.
 - + \$30 a week provides a Dual Generation family with basic needs such as utilities and groceries
 - + \$100 a week provides six months of child care costs for a parent seeking a degree or certificate.

A AWESOME ENGAGEMENT

- + Prizes, trivia, drawings, etc. are a great way to keep people connected and engaged. Consider having prizes for groups or departments who reach or exceed their goals.

L LIVE UNITED

- + Lead by example! Show your support of the campaign by wearing United Way gear, using the virtual backgrounds and talking about the impact of donations to United Way.



Kiara - San Antonio, TX

CAMPAIGN ENGAGEMENT IDEAS



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INCENTIVE STRUCTURE

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

- + **Participation:** Anyone who participates is eligible
- + **Timeframe:** Anyone who contributes by a specific day is eligible for a prize/drawing (early bird)
- + **Increasing their Gift:** Anyone who increases their gift over the previous year by a percentage is eligible for a prize
- + **Gift Level:** Anyone who gives a specific dollar amount, or more is entered into a special drawing
- + **Exceeding Company Goal:** If the company achieves a certain participation percentage, everyone is eligible for a prize

Incentives are flexible to any organization and any budget. We provide both in-person and virtual incentive ideas. Campaign Leaders can use incentives to encourage the speedy return of pledge cards, increase participation, encourage payroll deduction or leadership giving. Below are some great incentive suggestions to use for your campaign:

IN-PERSON: FOOD

- + **Thanks-a-Latte!** – Offer a latte stand and give examples of what giving up one cup of coffee, soda, or candy bar a day can do for a person in need
- + **Managers serve breakfast/lunch**
- + **Food Social** – Donuts, coffee, pizza, ice cream
- + **Boss cooks for donors**
- + **Bakery cart or bake sale**
- + **Sandwiches once a week for a month delivered to work area**
- + **Cookie jar filled each week with candy or cookies for department**

- + A party catered by one department for another
- + **Wine Tasting** – Hold a wine tasting event. Special drawings for bottles of wine or wine themed gifts are also held for contributors to the United Way campaign

IN-PERSON: AROUND THE OFFICE

- + Additional PTO/Vacation days
- + Early dismissal/Late start
- + Sleep in/Long lunch passes
- + Day off to do volunteer work
- + Free PTO day for their birthday
- + **Lazy Monday** – Employees who give at a certain level can have their name in a drawing to win a lazy Monday where they can sleep in and have coffee/breakfast delivered to their homes
- + **Spirit Week** – Crazy Hair Day, Favorite Team/Jersey Day, Hat Day, Company Color Day, Fun Zoom Background Day, Pajama Day, etc.
- + Reserved parking
- + Jean day/Casual dress pass
- + **Manager or CEO doing an employee's job for a day**, while employee gets day off
- + **Parties for high performing departments**
- + **Chair or hand massage**
- + **Dunk the CEO or senior leadership**



Mary - San Antonio, TX

CAMPAIGN ENGAGEMENT IDEAS



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IN-PERSON: OTHER/GAMES

- + Tickets (sporting game, movie, concert)
- + Bowl-a-thon
- + Balloon grams
- + Gift baskets/Gift certificates
- + Employee-designed T-shirts
- + Celebrity autographed items
- + Round of golf
- + Car wash by the boss or senior leader
- + Balloon Pop – Employees or vendors donate prizes for this event. Employees who gives at a certain level gets a balloon and pops it to find out what prize they've won.
- + Customized company swag

VIRTUAL: DELIVERY/GIFT CARDS

- + Use delivery service to deliver items to your employees – dinner for family, flowers, coffee, set up wish list on Amazon
- + Special Delivery – have your company executives deliver lunch to the highest bidder or drawing winner
- + Virtual gift cards/gift certificates/coupons (H-E-B, Uber, Door Dash, Amazon, etc.)

VIRTUAL: THANK YOU

- + Shout-outs in meetings, newsletters, on social media, and/or on company intranet
- + Personalized thank you from CEO or custom thank you e-card or video from leadership
- + Signed United Way posters

VIRTUAL: INCENTIVES

- + Custom-designed Zoom background
- + Home date night drawing – Enter to win gift cards to delivery service or local restaurants
- + Mentorship Chat – Virtual coffee chat with C-level executives
- + Executive Services – Executives at your office might offer up services such as carwashing, lawn mowing, etc.
- + Virtual happy hour with CEO/senior leadership
- + Paid subscription to a video/music streaming service

VIRTUAL: CLASSES/GAMES

- + Virtual classes (crafting, cooking, mixology, book club)
- + Virtual activities (BINGO, paint, movie, karaoke)
- + DRAW United – play a fun game while educating employees about United Way
- + Virtual Video Contest – Create challenges for your staff and ask participants to take a picture or video completing the challenge
- + Cute Pet Contest – Employees submit photos of their pet and vote to decide the winner
- + Executive Karaoke – Employees who give at a certain level can choose a song(s) for an executive to sing at a meeting or event
- + Host an Xbox or PlayStation video game tournament
- + Zoom Takeover – Find a local celebrity or friend with a unique pet to crash a video meeting



FREQUENTLY ASKED QUESTIONS



United Way of San Antonio
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HOW LONG SHOULD OUR WORKPLACE CAMPAIGN RUN?

The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources for both the campaign coordinator and campaign participants. A shorter campaign will get the message out effectively and makes your ask without overburdening staff. An exception could be if you are the campaign coordinator at a very large or multi-site company.

HOW CAN WE COLLECT DONATIONS ONLINE?

United Way of San Antonio and Bexar County offers an online giving platform, ePledge, available for your company to use and collect employee donations. This platform offers various levels of customization and can collect payroll deduction, credit card and e-checks gifts. For more information, or a demonstration of the site, contact your United Way Representative.

ARE DONATIONS TO UNITED WAY TAX DEDUCTIBLE?

If you itemize deductions on your annual taxes, then your contribution is tax deductible.

WHEN SHOULD OUR WORKPLACE CAMPAIGN RUN?

Most campaigns take place from August to November, but they can happen at a time that is best suited for your organization.

CAN EMPLOYEES DESIGNATE THEIR DONATION?

As a service to donors, we make it possible to specify a United Way Impact Partner program to receive your donation. However, the direct investment of your dollars designated to United Way of San Antonio and Bexar County goes further to strengthen our children, students, individuals and families – the building blocks of opportunity – in Bexar County.

WHEN DOES PAYROLL DEDUCTION START?

Payroll deduction usually runs from January 1 – December 31. However, United Way does not set your payroll schedule, it is a company decision.

THANK YOU

Thank you in advance for your efforts! By agreeing to lead your company's workplace campaign, you join a passionate group of change-seekers and trailblazers creating lasting change in Bexar County.

You are a frontline volunteer who raises awareness about the vital role United Way of San Antonio and Bexar County plays in the community. Together with passionate supporters like you, we're leading the charge to improve the lives of our children, students, individuals and families – the building blocks of opportunity for all San Antonians!

We hope this guide will provide you with the necessary resources to run your campaign. Please reach out to your United Way Representative who can provide additional support and guidance.



GET INVOLVED IN OUR WORK



United Way of San Antonio
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OUR WORK

Impact Councils

Our work supports four focus areas: Ready Children, Successful Students, Strong Individuals and Families and Safety Net. These four Impact Areas focus on “Collective Impact,” which brings together groups of partners from different sectors to work on a common agenda for solving specific social problems using a structured form of collaboration.

- + Ready Children:** The Ready Children Impact Council ensures all children grow up in safe, stable and nurturing environments, are healthy in mind, body and spirit and are ready to enter kindergarten and succeed in school.
- + Successful Students:** The Successful Students Impact Council ensures all young people are actively engaged in their communities, prepared for the 21st Century workforce and have resource-rich environments with prepared and engaged adults to support them in reaching their full potential.
- + Strong Individuals and Families:** The Strong Individuals and Families Impact Council ensures all individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination.
- + Safety Net:** The Safety Net Impact Council supports emergency and disaster care services to help stabilize individuals and families, meeting their most immediate needs. The Council focuses on providing short-term assistance that leads to self-sufficiency.

UNITED WAY 2-1-1 HELPLINE

2-1-1 is a free, anonymous social service hotline that helps people find information about local resources in their community. 2-1-1 Texas – Alamo Region is one of 24 Area Information Centers in Texas. The Alamo Region is comprised of Bexar and eleven surrounding counties.

MISSION UNITED

MISSION UNITED, a military information and referral program, helps military, veterans and their families navigate the robust, but complex, array of community and military support programs. In addition to assisting our military and veterans through supportive programs, MISSION UNITED has established a way to recognize military friendly agencies, stores and companies that acknowledge those who have served.

MEMBERSHIP GROUPS

Emerging Leaders

Our mission is to engage young professionals in United Way to strengthen the greater San Antonio community. Open to young professionals, aged 21 to 45, who support United Way of San Antonio and Bexar County by making an annual minimum gift of \$250, members of our Emerging Leaders Council (#ELCUWSA) see firsthand the difference they make impacting lives and creating lasting change here in our local community. Membership allows you to network with other young leaders, make a difference in our community and strengthen your personal and professional connections.

Women United

Women United mobilizes women who strengthen our community by investing in and promoting programs that positively impact our community's children, families and future. Council members engage with one another and the community in several ways: supporting education by adopting its signature cause, the Childcare Scholarship program; and participating in events and volunteer projects to learn, share, and grow. An annual minimum gift of \$500 each year is required for each member.

UWSA VOLUNTEER CENTER

Throughout the Bexar County area, United Way volunteers are changing lives and transforming our community. The Volunteer Center at United Way is the place to start if you want to get involved. Whether you are interested in mentoring a young person, preparing food bags for clients in a food pantry, or helping a senior, you can join us in making a difference. There's something for every interest and ability, including a variety of virtual volunteer activities.

DUAL GENERATION

The San Antonio Dual Generation Initiative is an unprecedented community-wide solution that coordinates the expertise of its partners who bring decades of experience serving children and families to help them find safe housing, education, childcare and employment. We are creating hope by removing barriers and enabling families to achieve greater stability and success.

We believe that when children are surrounded by strong families and healthy communities, they can break the cycle of poverty, achieve greater stability and fulfill their potential.

KICKOFF EVENT CHECKLIST



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FIRST

- ❑ **Confirm CEO/Executive Leadership Attendance.** Before picking an event date, work with the CEO's team to book their time and ensure they are available to host the kickoff event(s). Also consider whether your CEO would like support in scripting their speaking remarks or would like to speak to slides.

3-5 WEEKS BEFORE

- ❑ **Draft Invitation.** Gather the details of your event. If you need approval from others, consider starting a week earlier.
- ❑ **Confirm Invite List.** Pull and sort your invitation list. Work with your HR department to ensure you have captured all staff. Divide up the list (e.g. by department) if you are hosting multiple events.
- ❑ **Request Other Key Speakers.** If desired, work with your United Way Representative or Loaned Executive to request a speaker, to speak to the positive impact you're making in the community. Please submit this request as early as possible!
- ❑ **Prep Your Pledge Tool.** If you haven't started already, take steps to get your pledge collection method ready. Ensure your pledge cards are printed and/or your online pledge site is up and running.

2 WEEKS BEFORE

- ❑ **Send Invitation.** Send out e-invitation(s), providing the web conferencing information and any other important details.
- ❑ **Collect RSVPs.** Consider tracking RSVPs to help you determine future communications and reminders.

1 WEEK BEFORE

- ❑ **Send a Reminder.** Consider sending a reminder invitation or nudge, if many colleagues haven't responded to your initial invitation.
- ❑ **Update the Invitation.** If desired, make updates to the calendar invitation to include an agenda, presentation document, list of speakers or other key information. This update can also serve as a reminder to confirmed attendees.
- ❑ **Confirm Key Speakers.** Ensure you have all necessary pieces to enable a successful kickoff presence for your CEO. If applicable, check in with your United Way Representative or Loaned Executive to ensure everything is on track, and see if they have any questions (especially about how to access your virtual kickoff).
- ❑ **Prep Your Pledge Tool.** Check in on progress of your pledge cards or online pledge site. Will it be ready to go on event day?

DAY BEFORE

- ❑ **Test Your Pledge Platform.** If applicable, ensure your online pledge site is ready to accept donations.
- ❑ **Practice Run.** Complete a practice run to test your conferencing system, presentation documents, etc. This will help to identify issues you can rectify before event day.
- ❑ **Confirm Arrangements.** Confirm all catering, event space, etc. for an in-person kickoff.
- ❑ **Send In-Person Guidelines.** Share social distancing guidelines and check-in information.

EVENT DAY

- ❑ **Last Minute Test.** Test your conferencing system and any other technology, just in case.
- ❑ **Inspire!** Your event is virtually 'attended' by many, and will go off without a hitch. Your entire organization will be inspired to support their community and participate in this year's United Way Campaign!
- ❑ **Send the Donation Link.** Immediately after the event, give everyone the means to support their community by sending out the online pledge site link or pledge card reminder. If you've hosted multiple events, send the reminder out after the last kickoff event has concluded.

1-2 DAYS AFTER EVENT

- ❑ **Thank Others.** Send a follow-up communication to thank staff for joining your kickoff event and encourage them to consider making a donation. Thank key contributors to your kickoff (your speakers and anyone who supported your event). They'll be pleased to be recognized!