

United
Way



United Way of San Antonio
and Bexar County



2023 CAMPAIGN GUIDE



STEPS TO A SUCCESSFUL CAMPAIGN



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BEFORE: 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

STEP 1: SET CAMPAIGN GOAL

Once you decide you are running a campaign, determine the parameters of your campaign to set yourself up for success.

- + Meet with your CEO to set a challenging, yet attainable goal
- + Obtain visible support for your campaign – Ask for an executive chair to help promote the campaign
- + Meet with your United Way Representative
- + Form a campaign committee to assist you
- + Determine campaign incentive ideas with leadership
- + Select campaign dates



Marbella - San Antonio, TX

INCENTIVE STRUCTURE

To get the most out of incentives, consider how best to structure them for your campaign.

- + **Participation:** Anyone who participates is eligible
- + **Early Bird Perk:** Anyone who contributes by a specific day is eligible for a prize or drawing
- + **Increasing Their Gift:** Anyone who increases their gift over the previous year by a specified percentage is eligible for a prize
- + **Corporate Match:** For every employee dollar donated, the company matches the gift
- + **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

INCENTIVE IDEAS

- + Additional PTO or Vacation Days
- + Jeans or Casual Dress Days
- + Raffle Entries for Prize(s)
- + Parking Pass or Designated Parking
- + Department or Team Rewards
- + Exclusive events such as dinner or happy hour

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STEP 2: UTILIZE UNITED WAY RESOURCES

United Way is here to support your campaign! We offer robust resources to help you become advocates for United Way and tools to help you educate others about our work in the community.

- + Utilize the UWSA Campaign Toolkit for stories, informational one-pagers, communication templates and more
- + The UWSA Volunteer Center can help coordinate a volunteer project or event
- + Invite a United Way staff member to share our work
- + Coordinate with United Way to host an event promoting Membership Groups or Leadership Giving
- + Share why you support United Way and if you know any coworkers that United Way has helped, ask them to share their stories.

If you are interested in a volunteer project or hosting a United Way speaker, please submit your request to your United Way Representative as early as possible.



Luz - San Antonio, TX

CAMPAIGN TOOLKIT

The UWSA Campaign Toolkit is one-stop shop for campaign resources.

IMPACT STORIES

Stories are a powerful tool for sharing United Way's work and why it's important to give. Share stories from people here in San Antonio who were impacted by United Way.

Each story is available in the following formats:

- + Video
- + PDFs
- + Blogs

CAMPAIGN POSTER

Download our campaign poster and learn more about our artist.

ONE-PAGERS

- + Our Value
- + Our Work in Action
- + Frequently Asked Questions
- + Impact Areas
- + Leadership Giving
- + Membership Groups
- + 2-1-1 Helpline
- + Mission United
- + UWSA Programs
- + and more!

COMMUNICATION TEMPLATES

- + Email Templates
- + Additional Short Stories

PLEDGE CARDS

- + Pledge Cards
- + New Employee Welcome

DIGITAL ASSETS

- + Zoom Backgrounds
- + Social Media Assets
- + Photo Library
- + UWSA Logos

To access the toolkit,
use the QR code or visit
[uwsatx.org/campaign-toolkit](https://www.uwsatx.org/campaign-toolkit)



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STEP 3: PLAN ACTIVITIES AND ENGAGEMENT DAYS

Hosting activities and engagement days gets your company excited during campaign. When employees are engaged and able to get excited about giving, they are more likely to make a pledge.

- + Have a kickoff event for employees to hear from company and campaign leadership
- + Host a United Way speaker by coordinating with your United Way representative
- + Record a video from a senior executive to be distributed electronically to all employees
- + Encourage employees to participate in volunteer opportunities on their own or as a company
- + Create opportunities for supporting the campaign beyond pledging such as a silent auction or bake sale
- + Consider having smaller department events once the campaign is launched to promote donation options or add as an agenda item to an existing meeting
- + Plan a special event to promote Leadership Giving and/or an event to recognize Leadership Donors

STEP 4: COMMUNICATE

Think of all the avenues your organization distributes information to its employees to make sure the campaign is communicated to everyone.

- + Consolidate and coordinate outgoing communications to avoid overwhelming employees
- + Advertise where employees are: TVs in common areas, break rooms or cafeterias
- + Promote any corporate match, corporate gifts or other incentives to increase contributions
- + Have your Campaign Committee make individuals asks of their team
- + Provide updates throughout your campaign to celebrate getting closer or meeting your goal
- + Ask new hires to give and make their pledge during new employee orientation

ENGAGEMENT IDEAS

- + 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
- + Silent Auction - Ask employees to donate items for a silent auction to benefit your campaign
- + Spirit Week - Crazy Hair Day, Company Color Day, Pajama Day, etc.
- + Dunk the CEO or Senior Leadership - Employees can donate to see their senior leader get dunked!

LEADERSHIP GIVING

United Way Leadership Societies are a way for employees to extend their impact and deepen their engagement with our work. Based on their contribution, donors are recognized as members of a Leadership Society.

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

MEMBERSHIP GROUPS

United Way Membership Groups are unique opportunities for individuals to get more involved in their community. Members receive invites to exclusive networking, events and volunteer opportunities.

Women United mobilizes women who strengthen our community. Members invest \$500 or more annually.

Emerging Leaders is a network of young professionals who are passionate about making a difference in our community. Members are ages 21 - 45 and invest \$250 or more annually.

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STEP 5: THE ASK

**THIS IS THE MOST IMPORTANT PART OF
YOUR ROLE AS 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.

- + Work with a Team – Assign department leads to help ensure everyone has the opportunity to participate.
- + Ask every employee to participate by making a donation. Remember to include new hires, retirees and your board of directors.

Here are the two best methods for making the ask:

- + Personal – The one-on-one ask is often the most effective. It allows you to educate employees about United Way and answer any questions they have.
- + Group or Department Meetings – Plan small meetings so that they can learn about United Way. Make sure you invite your United Way Representative or Loaned Executive to participate.

PARTNER WITH UNITED WAY YEAR-ROUND

Connect with your United Way Representative for ways to get more involved with United Way.

- + Sponsor a UWSA Volunteer Center Signature Project to increase your company's visibility as a philanthropic organization
- + Utilize the UWSA Volunteer Center to help coordinate volunteer events and/or resources needed for projects
- + Qualifying donors are invited to participate in events for their corresponding Leadership Society and/or join our Membership Groups
- + Run a micro-campaign to encourage giving throughout the year
- + Invite new employees to make a pledge

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.

Recognition Ideas:

- + Email
- + Hand-written thank you notes
- + Appreciation certificates
- + Thank you reception or breakfast
- + Recognize and thank the Campaign Committee
- + Host an event for donors who give at a certain level.
- + Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet

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.

