



EMPLOYEE ENGAGEMENT GUIDE

Simple strategies to build a team of fundraisers, hand raisers, changemakers, and game changers.

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United Way of the
Greater Dayton Area

WELCOME!



At United Way of the Greater Dayton Area (UWGDA), we want to change the world, starting in our own backyard. By committing to running a workplace campaign, we know you do too.

It takes planning, creativity, and dedication to organize and engage employees in workplace giving campaigns. But you, along with hundreds of other community-minded organizations, are much more than fundraisers. You are hand raisers, game changers, and change makers. You are joining United Way of the Greater Dayton Area in our fight to ensure every person, in every community, has the same chance to live their best life.

You, as the organizers of the campaign, are the heart of making it a success—and a successful campaign means that we are one step closer to solving some of the toughest challenges the Miami Valley faces: poverty, poor health, and lagging educational achievement. Together, we can meet the needs of our local community and empower thousands of low-income children and families to reach their potential.

We understand that you have many responsibilities and we truly appreciate your willingness to provide your time and leadership to help improve our community. We hope the information in this guide will give you the tools and guidance you need to make your campaign easy and fun! Remember, you are not alone! Please be sure to call on a Staff Member at any time.

Thank you for being our partner and champion for change!

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BEST PRACTICES



SECURE TOP-LEVEL SUPPORT AND CORPORATE GIFT

Endorsement from your CEO and company is vital to the overall success of your fundraising efforts.

- Encourage your CEO to show support at meetings and volunteer projects, and send communications to employees.
- Select senior executives to lead the campaign or serve in a leadership/supporting role on the planning committee.
- Consider a corporate match on employees dollars as a great way to incentivize a donor's pledge and show that you appreciate his or her generosity.

STRENGTHEN YOUR COMPANY BY CULTIVATING PHILANTHROPIC LEADERS

UWGDA donor society members are leaders in their organizations, leaders in our community, and leaders in generosity.

- Plan a separate opportunity for key executives or management team to learn about giving at the leadership level.
- Arrange separate (and fun!) meetings or events with current and prospective donor society members (Toqueville, Beaumont, and Leadership Societies) where UWGDA can discuss special volunteer and networking opportunities, and other membership benefits.

CONDUCT A FUN AND EDUCATIONAL CAMPAIGN

Don't do it alone! Form a committee and make the campaign fun for employees by incorporating a theme and events.

- Use incentives to help motivate employees to attend activities, increase their giving, and turn special event donations into payroll deductions/monthly pledges.
- Educate and inspire before asking, communicate the work of UWGDA by allowing us to present our work in employee meetings and send stories of impact via email.
- **Go paperless!** Online mobile friendly campaigns are quicker, easier, and can show instant results and impact.
- Promote the UWGDA through email, on social media, web pages, and around the office.

THANK DONORS

The two most important words to remember, and the ones people appreciate the most, are THANK YOU.

- Thank donors through UWGDA.
- Share the details of who gave to the campaign so UWGDA can thank individual donors for their generosity and report back to them on where their gift is invested and the impact it is making.
- **Donors who gave \$10,000 or more are eligible for membership in our Tocqueville Society.** Help us engage them so they can learn about exciting events, networking opportunities, and rewarding volunteer opportunities for which they now qualify.

Thanks donors throughout the campaign.

- Post thank you posters around your workplace.
- Send thank you letters or e-cards from your CEO and campaign chairs.
- Highlight givers of a certain level in a public space.
- Host an event for donors who give at a certain level or who have been giving for a certain number of years.
- Give recognition to the planning committee/team for their hard work.

BEST PRACTICES



REVIEW AND WRAP-UP

- Inform the leadership team of results and publicize results in newsletters, emails, or intranet sites.
- Plan out year-round engagement with UWGDA like donation drives, volunteer opportunities, and advocacy cause campaigns. **Consider signing up for our Day of Action!**

ENGAGE YEAR-ROUND

- **Develop a Plan** – Communicate back to employees about how their investments are making an impact. UWGDA has videos, newsletter articles, stats, web banners, and much more at www.LiveUnitedDayton.org to share with your team.
- **Advocate** – Stay informed and champion a cause through an advocacy cause campaign. Does your team care about early education, graduation rates, health, or financial stability? We always have a way to engage around an issues you may care about. Visit www.LiveUnitedDayton.org/advocate
- **Volunteer** – Consider providing paid volunteer time off (VTO) as a benefit for your staff. Visit www.LiveUnitedDayton.org/volunteer.

GOAL SETTING WORKSHEET

Set a challenging, yet attainable goal. Be ambitious, but realistic!

PREVIOUS YEAR'S TOTALS

Total Previous Employees

Total Previous Corporate Gift

Total Previous Leadership Givers

Percent Previous Participation

CURRENT GOALS

Employee Contribution + Special Events = \$ _____

Corporate Match/Gift = \$ _____

New Leadership Givers = \$ _____

New Donors X Average Gift = \$ _____

STRATEGIES FOR A SUCCESSFUL ASK



HOW TO ASK FOR A GIFT

Get Donors Undivided Attention

- Start the discussion on a positive, friendly note.
- Explain the purpose.
- Find out what they know about UWGDA.
- Identify your loyal donors and thank them.

Explain United Way of the Greater Dayton Area and Why You Support Us

- Bring UWGDA materials and be prepared to explain to them. Provide flyers/brochures to each person, show a video, or give a presentation.
- Share a personal story, success story, or UWGDA facts.

Ask for a Gift

- With new donors, ask for a first time gift and offer an incentive for giving.
- For annual donors, encourage or incentivize them to increase their gift—consider asking for a specific increase, such as \$1 more per week or per pay period, or a 10% increase.
- Remember, you are not asking for yourself, you are asking on behalf of the 137,000 low-income people in Greene, Montgomery, and Preble County that UWGDA reaches each year.
- Offer incentives to pledge online through one of our interactive tools.

Answer Questions

- Know your materials and answer any questions honestly—never guess.
- Use UWGDA FAQ's (included in this guide) to help answer questions.
- If you don't know the answer to a question, let the donor know you will find out and then follow up with a UWGDA Staff Member.
- Recognize that some donors have real concerns, people should feel good about their gift.

Say "Thank You" and Inform

- Regardless of what the donor decides, thank them for their time and consideration.
- Be sure to follow up with communications about how their gift is making an impact in our community.

CAMPAIGN TIMELINE AND CHECKLIST



PRE-CAMPAIGN



8 - 10 WEEKS

- _____ Meet with previous campaign and committee members to discuss last year's success and challenges.
- _____ Meet with corporate leadership to discuss campaign goals, incentives, and corporate support of the upcoming campaign.
- _____ Recruit a workplace giving campaign committee.
- _____ Identify and recruit ambassadors to be spokespeople during the campaign. Are these people currently involved in United Way of The Greater Dayton Area's (UWGDA) work? Maybe a volunteer could share their story or experience?



4 - 6 WEEKS

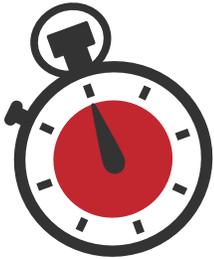
- _____ Schedule site visits through Volunteer Connection, there's no better way to see your donations in action.
- _____ Set overall campaign goal.
- _____ Set campaign timeline, *i.e. How long will the campaign run?*
- _____ Begin to plan a campaign closing celebration.
- _____ Request additional campaign materials from UWGDA—pledge forms, informational brochures, campaign posters, videos, stories, online pledging tools.



2 WEEKS

- _____ Is your campaign kick-off event planned? Will you provide lunch or other incentives to encourage attendance?
- _____ Create a buzz about the campaign. Post information on company intranet sites, in newsletters, or hang up posters.
- _____ Ask someone from your executive team (CEOs are perfect!) to send an all-staff email announcing the upcoming campaign and create some excitement by announcing prizes, contests, and events.

CAMPAIGN



DURATION: ONE WEEK TO ONE MONTH

- _____ Hold an employee campaign kickoff event! Announce corporate goals and incentives for participation.
- _____ Hold your fun events, including BBQs, games, contests, and more.
- _____ Provide employees with pledge materials. If you have an online pledge platform, email the link to employees with a message from the CEO asking for employee participation and announcing corporate goals.
- _____ Share daily updates with staff and incorporate inspirational stories from employees and UWGDA.

POST-CAMPAIGN



DURATION: ONE WEEK TO TWO WEEKS

- _____ Hold a closing campaign celebration to announce your success!
- _____ Send appreciation letters to committees, ambassadors, and other volunteers.
- _____ Thank donors who supported the campaign.
- _____ Connect with and send campaign results to UWGDA.
- _____ Hold a debriefing meeting to discuss campaign outcomes, successes, and challenges in preparation for future campaigns.
- _____ Sign up for volunteer events and plan volunteer opportunities to show employees the impact of their gifts throughout the year.

SPECIAL EVENT THEME AND IDEAS



While the emphasis of your campaign should be on engagement, education, and giving—many companies incorporate extra events into their campaign to increase participation and excitement. **Remember, pledge first, play later—special events should compliment your campaign, not replace it.**

KICKOFF AND WRAP-UP

A kickoff party is a great way to generate excitement for your campaign. It is the perfect time to introduce your United Way Corporate Engagement Advisor or Specialist to your team during the first educational meeting with a message specific to your campaign. Finish your campaign strong with a wrap-up party, and thank your team for their participation. With our online pledging tools, you can even get a final amount raised to announce in real time!

A campaign theme is a great way to tie your activities together and motivate employees. Here are some theme, incentive, and special event ideas that many organizations have found successful:

Campaign Theme Ideas:

Broadway/Hollywood/Movies
Carnival/Mardi Gras
Decades/History
Hawaiian/Beach/Exotic Locales
James Bond/Detective
Music
Olympics
Pirates/Cowboys
Sports/Local Teams
Superheroes

Incentive Ideas:

Coupons or gift certificates
Dinner, lunch or a round of golf
with the CEO
Dress down days
Movie or sports tickets
Mugs, t-shirts, key chains, etc.
Prime parking spaces
PTO hour, half or full day
Sleep-in-late or
leave-work-early days

Special Event Ideas:

Auction/Garage sale
Baby/Pet picture match game
Bake sale
Biker race, fun run/walk
Bingo
Bowl-a-thon
Carnival
Car wash
Company cookbook
Children's drawing contest
Chili cook-off
Dunk tank
Employee funniest home video
Golf tournament
Ice cream social
Jail and bail
Lunch box auction
Pancake breakfast
Pizza party
Pot luck
Prize drawing
Pumpkin carving or decorating
activity
Remote control car races
Softball tournament
Tug-of-war
Ugly tie, sweater, prom dress,
or jewelry contest

VOLUNTEER



Meaningful community solutions require more than money, programs or policies. The kind of real and lasting change that benefits everyone is only possible when people from all walks of life are willing to roll up their sleeves and go where their time and talent is most needed.

United Way of the Greater Dayton Area's (UWGDA) Volunteer Connection can develop one-time or ongoing hands-on group volunteer projects for employees so they can stay connected year-round. UWGDA needs volunteers who will:

- Serve as mentors, tutors, or readers in our community schools and neighborhood centers
- Participate in one-day service projects throughout the summer that benefit low-income children enrolled in *Freedom Schools*
- Host donation drives for school supplies, books, blankets, or winter gear
- Share expertise on a committee

AS AN ORGANIZATION, YOU CAN ALSO COMMIT TO A YEAR OF ACTION AND PARTICIPATE IN THE FOLLOWING VOLUNTEER EVENTS THROUGHOUT THE YEAR:

January 20: *Martin Luther King, Jr. Day*

Help students and teachers celebrate Dr. King's birthday by reading in classrooms and leading literacy activities.

April 17 – 19: *Global Youth Service Days*

Help our younger generation build stronger, more vibrant communities through service. Volunteers 18 and under participate and support our community through multiple volunteer opportunities.

June 19: *United Way Day of Action*

Join United Ways across the country as we kick off summer with volunteer projects that support summer learning, health kids, and strong families.

September 11: *9/11 National Day of Service*

Groups big and small can connect with projects in Montgomery, Greene, and Preble counties that include beautification, cleanup, school projects, and client interaction and support.

October 16: *Make a Difference Day*

Every volunteer makes a difference so join our network of volunteers who are committed to creating lasting change in the Miami Valley. Volunteers can choose how to support our community in ways that are meaningful to you!

Find volunteer opportunities that match your skills and passion at www.liveuniteddayton.org/volunteer or contact Nick Eddy at nicke@dayton-unityedway.org or 937,225.3039

FAQs



WHAT DOES UNITED WAY OF THE GREATER DAYTON AREA DO?

United Way of the Greater Dayton Area (UWGDA) fights for every person in our community. We fight to ensure students graduate from high school, individuals have access to quality healthcare and kids and families have the financial stability needed to be successful in school and in life. We do this by assessing community conditions, investing in focused collective impact goals, bringing together partners and measuring results to create long-lasting results on a community-wide level. We are working together to solve the most difficult problems we face as a community.

HOW CAN I BE SURE MY CONTRIBUTION IS WELL MANAGED AND WELL SPENT?

UWGDA is dedicated to being transparent and accountable in all that we do. Recently, *Charity Navigator* and the *Better Business Bureau* evaluated United Way of the Greater Dayton Area on our transparency and accountability. Overall, *Charity Navigator* gave UWGDA a rating of 70 out of 70—a four star rating for exceptional transparency and accountability—exceeding industry standards. *Better Business Bureau* concluded that United Way of the Greater Dayton Area meets all 20 standards for charity accountability, making UWGDA a *Better Business Bureau Accredited Charity*. More information, including all our financial documents, are available online at www.liveuniteddayton.org/aboutus

HOW MUCH OF MY CONTRIBUTION GOES TO HELPING THE COMMUNITY?

Currently, United Way of the Greater Dayton Area does deduct a nominal fee from individual contributions. The organization's cost of doing business is covered by these fees which comprise only 4% of our total revenue compared to a community foundation whose fees make up typically 20% of their revenue.

WHAT FINANCIAL SAFEGUARDS ARE IN PLACE AT UNITED WAY?

UWGDA is committed to the highest standards of accountability and transparency when investing donor dollars. Among other controls, as a matter of practice, no single staff member is able to process any transaction from start to finish, and all checks must be signed by two authorized signers. The Finance Committee and Board of Directors review financial statements quarterly to ensure adherence to the budget. An independent accounting firm audits UWGDA once a year and the Finance Committee and Board of Directors must review and approve each audit.

WHY SHOULD I GIVE TO UNITED WAY AND NOT DIRECTLY TO AN AGENCY?

No other single organization has the scope, expertise, or influence to bring thousands of partners and volunteers, from all sectors, around the common vision of achieving long lasting results for a stronger, healthier community. When you give to a specific charity, you support only an individual cause. When you give to UWGDA, your gift becomes part of the collective effort to strengthen our entire community. Your gift to UWGDA allows you to accomplish more than you could alone, or through a single charity.

FAQs



WHY ISN'T MY FAVORITE NONPROFIT FUNDED BY UNITED WAY?

In some cases, an agency may be doing great work, but it may not have programs that align with the collective impact goals of United Way and its partners. In other cases, the agency may not meet United Way's rigorous criteria for performance and accountability.

HOW DOES UNITED WAY PAY FOR ITS EVENTS?

Annual events, such as the Big Thanks and the John Moore Society Breakfast, create a space for thousands of donors to get engaged in their community. All of the cost for these events, including all our advertisements are underwritten by generous sponsors. UWGDA small business and corporate partners help to offset the operational costs of events such as, space rental, food, or advertising.

IS MY GIFT TAX-DEDUCTIBLE?

Yes. UWGDA is a federally registered 501(c)(3) nonprofit corporation. Donations to United Way are tax deductible to the extent allowed by an individual's or corporation's circumstances.

WILL THE MONEY I GIVE TO UNITED WAY GO OUTSIDE THE COMMUNITY?

No. The money raised in our service area of Greene, Montgomery, and Preble counties, stays here, unless you, as the donor, request that it be sent elsewhere. Your local United Way does pay annual dues to United Way Worldwide, the trade association for United Ways. Those dues, which amount to less than one cent of every dollar given, represent the only money that leaves our service area—and those dollars are eventually returned to the community in services received.

ARE THERE OTHER WAYS I CAN CONTRIBUTE TO UNITED WAY?

YES! Please join us and GIVE, ADVOCATE, and VOLUNTEER. Whether it's investing a portion of your budget in philanthropy, emailing your legislator about prioritizing access to education, or mentoring a young high school student toward graduation, there are countless options available to you every day. Use your skills and passion and be a hand-raiser, a change-maker, and partner in real community change that lasts.



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CONGRATULATIONS!

Welcome to your new position! You work for a company that cares about our community. Your new employer and fellow employees have shown they care and compassion by generously supporting the United Way of the Greater Dayton Area. We invite you to join them as we work to improve the quality of life for everyone living in Montgomery, Greene, and Preble counties.

WE CARE ABOUT YOU AND YOUR COMMUNITY

United Way of the Greater Dayton Area carefully tends a local network of the best health and human service solutions available—something they have been doing for nearly a century. This cultivation includes monitoring local needs, identifying the most effective programs and giving these programs consistent support as they help our neighbors build a better life for themselves and their families ... which in turn means a better community for all.

If you would like to start supporting your community today there are many ways you can give. You can contribute to your workplace campaign by filling out a pledge card or make a donation by credit card at www.liveuniteddayton.org.

Looking for ways to lessen your tax burden? Consider **contributions of qualified appreciated stocks, bonds, or mutual funds**. The greater the appreciation, the bigger the tax savings will be. Donating these assets directly to the United Way can save you the trouble of finding out the original value.

A **donor advised fund** is a program through United Way that allows you to make contributions to the charity, claim a tax deduction in the current year, and then decide your own timetable for distributing the funds. This strategy might be attractive to taxpayers who will not itemize due to the increased standard deduction. Taxpayers can consider bundling two years of donations in one year, which might allow them to itemize every other year. In the years they do not itemize they would still make contributions from the **donor advised fund**, allowing them to develop a multi-year giving plan and maximize the use of the standard deduction. It is also a great way for charitably inclined individuals to minimize taxes in a year of unexpectedly high earnings.

One might also consider a **charitable remainder trust**. This trust pays out annually to you or your family with the remaining assets going to United Way at the end of the trust term.

Before undertaking any of these strategies please consult your legal and/or tax advisor.



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BEST WISHES!

Congratulations on your retirement! Over the years, you and your coworkers have improved the lives of hundreds of thousands of people in Montgomery, Greene, and Preble Counties. As you prepare to embark on an exciting new chapter in your life, United Way of the Greater Dayton Area would like to offer ways to stay connected to your good work in our community.

SHARE YOUR PASSION AND EXPERIENCE

Your skills and experiences can help shape our nonprofit community for the better. United Way's Volunteer Connection will be happy to connect you with volunteer opportunities that match your passions and availability. Visit www.VolunteerDayton.org or call 937.225.3059 to find out ways you can stay active in your community.

Whether you have supported United Way for years or have just been acquainted, you know that United Way allows for easy giving to our local network of health and human services. Please continue to show your support by filling out the enclosed pledge card. Or if you are interested in making a lasting impact on the Greater Dayton Area here are some other ways you can give.

In 2015, Congress made the **qualified charitable distribution** from Individual Retirement Accounts (IRA) a permanent option for donors. IRA account holders age 70½ and older who plan to donate to a nonprofit this year may want to make a **qualified charitable distribution** from their IRA. This distribution could satisfy charitable giving goals and allow funds to be withdrawn tax-free from your IRA. It is also effective for higher-income taxpayers trying to minimize their adjusted gross income to avoid taxation of social security benefits, avoid increases in Medicare premiums, minimize the passive income tax, or reduce state income taxes.

Families who would like to provide for their next generation over the longer term, but also benefit charitable organizations in the interim, may choose a **charitable lead annuity trust**. This type of trust provides for fixed payments to a charity over a term of years, with the remainder passing to family members. In today's low interest rate environment, the relative value of the charitable deduction with a charitable lead annuity trust is high. These can be structured either with an upfront charitable income tax deduction for the grantor, or with an annual charitable deduction within the trust.

Before undertaking any of these strategies please consult your legal and/or tax advisor.