



# UNITED WAY OF METROPOLITAN DALLAS 2023 CAMPAIGN GUIDE

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## WELCOME TO THE TEAM!

Thank you in advance for your efforts! As the leader of your company’s workplace campaign, you join a passionate group of change-seekers and trailblazers creating lasting change in North Texas.

We are grateful for your support in raising awareness about the vital role United Way and supporters like you play in improving access to education, income and health in North Texas.

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



## WE'RE ON A MISSION

United Way of Metropolitan Dallas leads a movement to improve access to education, income and health—the building blocks of opportunity. We believe in the power of unity and equity to make lasting change. Together, with committed change-seekers like you, we create opportunity for 1.6 million North Texans every year.

## HOW WE DO IT

We foster social innovation, mobilize volunteers, drive business participation, and spur the public and lawmakers to work together to tackle systemic challenges in education, income and health.

## ASPIRE UNITED 2030 GOALS

We've collaborated with a broad spectrum of community partners to develop a set of 10-year goals in the areas of education, income and health. Through collaborative initiatives and targeted community impact work, United Way and dedicated supporters ensure more students graduate high school prepared for success in college or career, more families are financially stable and more North Texans live longer, healthier lives.



INCREASE BY

50%

the number of students reading on grade level by third grade.



INCREASE TO

96%

the number of North Texans with access to affordable health care.



INCREASE BY

20%

the number of young adults who earn a living wage, adding nearly \$800 million per year to the local economy.



# GOALS OF A WORKPLACE CAMPAIGN

Workplace campaigns serve an important purpose for both United Way of Metropolitan Dallas and our corporate partners:

- Employee giving campaigns are an important source of funding, volunteer and advocacy support, which drives measurable impact in the areas of education, income and health.
- Annual giving campaigns also enable our dedicated partners to engage employees and give back to the community while promoting a culture of social responsibility, team building and fun!

As the coordinator of your company's workplace campaign, you'll be in charge of planning and executing your campaign, with the help of your United Way relationship manager and your internal campaign team.

Your goal is to engage as many of your coworkers as possible in your campaign, sharing information about United Way's mission and impact in the community, and inspiring employees to invest in better outcomes for North Texans through a one-time or recurring gift to United Way. You can also leverage volunteer opportunities so employees can feel the impact of their giving and build excitement about the campaign.

Read on for step-by-step instructions on running a successful campaign, as well as detailed information on giving and volunteering opportunities, best practices and frequently asked questions.



# STEPS TO A SUCCESSFUL CAMPAIGN

## 1 PREPARE:

- Meet with your United Way relationship manager to review opportunities to boost campaign success.
- Set your campaign dates. Allow plenty of time to plan events, create strategic messaging and establish a communications timeline.
- Assemble a campaign team to help distribute campaign messaging across departments or business units. A good ratio is one campaign team member per every 25 employees. Meet with your team regularly to share campaign messaging and plans, and to recruit volunteers to help with campaign events.
- Set a campaign goal that your campaign team and employees can rally behind. This could be a monetary or participation goal, depending on what works for your organization.
- Identify opportunities for campaign events where the United Way message can be shared with a large audience.
- Establish key dates for distributing company-wide messaging (e.g., to announce the campaign, on launch day, mid-campaign, final push and thank you)

## 2 EXECUTE:

- Launch your campaign. Consider hosting a campaign kickoff event where your organization's leadership can share the importance of philanthropy to the company. Or, record and distribute video messages from your executive (and dedicated United Way supporters at any level) to encourage all employees to get involved in the campaign.
- Hold a few events to share information on the issues facing our community and how United Way is positively impacting North Texans. Schedule a company volunteer event for employees to feel the impact of their giving.
- Send company-wide messages throughout the campaign to encourage employees to participate, announce events and incentives, share campaign progress, recognize employees/teams, and more. For easy-to-use email templates, download our [Email Toolkit](#).
- Share social media posts on your corporate accounts to inform customers and partners of your support of United Way and progress toward your campaign goals. For social media tips and templates, download our [Social Media Toolkit](#).
- Build and maintain excitement with campaign materials and videos, which are available for download in our [Workplace Campaign Toolkit](#).
- Utilize your campaign team members to keep the campaign top of mind during team meetings, conference calls or when making personal "asks." Continue to meet with the team regularly to discuss strategies and needs.

# STEPS TO A SUCCESSFUL CAMPAIGN

## 3 INCENTIVIZE:

- Decide which employees you want to target (e.g., non-contributors, contributors who increase their gifts, or employees who return pledge forms by a certain date) and how best to reach them.
- To encourage participation, consider offering incentives or prizes. For example, hold a raffle and award one drawing ticket for key actions (e.g., contributing for the first time or returning a pledge form). Or, hold a special event that is only open to contributors.
- Run team challenges with exciting prizes—for example, the team with the highest participation wins a free day off.
- Recognize contributors in your company-wide messages or on your corporate social media accounts, and tell their stories of “Why I Live United.”

## 4 WRAP UP:

- Finalize campaign results and share them with your United Way relationship manager. Payroll deduction information should be submitted to your HR or payroll processing department.
- Send a thank you note to the entire company and/or to individual donors.
- Thank your campaign team.
- Plan for next year. Gather feedback from employees and your campaign team, and compile notes and resources for next year’s campaign team.
- Share and celebrate your results company-wide and on social media.



# CAMPAIGN CHECKLIST

- Determine the dates for your campaign and set fundraising and/or participation goals.

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- Meet with your United Way relationship manager to create strategies for your campaign.

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- Form a campaign team to help with communication, special events and fundraising.

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- Coordinate campaign messaging and develop a timeline for company-wide distribution.

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- Host a kickoff event with company leadership and a United Way representative present to speak about the importance of the campaign.

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- Implement an onsite, offsite or virtual Day of Impact to demonstrate the impact of United Way.

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- Host employee education meetings and events throughout the campaign.

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- Share progress toward your goals regularly during the campaign.

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- Announce and celebrate your results.

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- Thank your donors and campaign team members for their support.



# CAMPAIGN BEST PRACTICES

## KICKOFF:

- Plan a pep rally over breakfast or lunch.
- Have a senior executive and United Way representative speak at the event.
- Show a United Way speaker video to demonstrate impact of donations.

## UTILIZE AVAILABLE RESOURCES:

- The Workplace Campaign toolkit is available [online](#). This toolkit includes sample email messaging, video links, PDFs of collateral materials and more.
- Your United Way relationship manager can guide you through all steps of running a campaign as well as help you goal set, train your team and more.
- Need something that is not available in the online tool kit? Ask your relationship manager!



## BRIGHT IDEA

Baker Botts hosts an annual kickoff luncheon for partners and associates that features presentations from their partner in charge and United Way leadership. The message is focused on United Way's impact in North Texas and the importance of community-wide involvement to advance our work.





# CAMPAIGN BEST PRACTICES

## COMMUNICATIONS:

- Consolidate and coordinate outgoing communications to avoid overwhelming employees.
- Use email, social media or intranet posts to promote any corporate match, corporate gifts, events or other incentives, which helps increase contributions.
- Use your company logo along with the United Way logo on selected communications and/or items to create team spirit and promote the campaign. For guidance on using our logo view our [Brand Guidelines](#).
- A picture is worth a thousand words! When possible, use photos or videos in your communication and storytelling to help connect people to our mission. Download United Way branded photos and videos from our Workplace Campaign [Toolkit](#).



## BRIGHT IDEA

Throughout their 12-day campaign, Texas Instruments follows a strategic communications timeline that educates employees and inspires them to give through a variety of platforms. The communications include company-wide emails from the senior vice president, a campaign page on their intranet and videos sent from United Way's president and CEO.

- Communicate the impact of donation pledges in emails, on posters and by sharing the "Impact of Your Donation" card, available in our Workplace Campaign [Toolkit](#).
  - \$3 a paycheck enables a student to participate in interactive STEM programs.
  - \$20 a paycheck gives one child or adult access to affordable health care.
  - \$36 a paycheck delivers 12 free books to a child, encouraging early literacy.
  - \$40 a paycheck provides a young adult the training necessary to find a job and succeed in a career.
  - \$100 a paycheck provides a student the opportunity to attend a quality preschool.
- Celebrate your wins. Keep momentum going by communicating daily wins and keeping employees up to date on the progress of the campaign.
- Remember, face-to-face "asks" are best. After all, people give to people. Have your campaign team members ask their peers in team meetings or one-on-one conversations to consider making a gift to the campaign.



# CAMPAIGN BEST PRACTICES

## INCENTIVES:

- Accelerate success and keep people connected with the campaign by offering daily prizes, special events and raffles, with each completed pledge form serving as the contributor's "ticket." Consider individual prizes for those who reach their personal goal and for teams who reach their goals.
- Popular prizes include a day off, company swag or tickets for unique experiences.
- Popular events include dress down days, potluck lunches, silent auctions and bake sales. Your United Way relationship manager can provide you with talking points for these events.
- Take photos of your campaign events and share them on social media with the hashtag #LiveUnited to let followers know you're invested in giving back to the community employees.

## GIVING SOCIETIES:

- When asking for donations, remember that United Way Giving Societies are a great way for employees to extend their impact and deepen their engagement with our work. Based on their annual giving level, employees can join the following Giving Societies and take part in meaningful, year-round events and volunteer opportunities.
  - » **Emerging Leaders** (35 and under, \$250+)
  - » **Leadership Society** (\$1,000+)
  - » **Builders Society** (\$2,500+)
  - » **Tocqueville Society** (\$10,000+)

## EVENTS:

- Use a special event to focus attention on the campaign and United Way's impact on the community—but don't use an event as your total campaign effort.
- Host events after the campaign is launched and donation options have been clearly communicated.
- Request a United Way representative to speak at your event to share details about our mission and impact in the community.
- Invite your colleagues to speak during your event and explain why they give to United Way. When possible, ensure your speakers are a mix of leadership, who will set an example from the top, and other employees who are outspoken United Way supporters.
- When appropriate, tie special events to completed pledge cards, and encourage the use of payroll deductions.
- Consider a special event as an extra incentive to help you meet your "stretch" goal.

## RECOGNITION AND THANKS:

- Send thank-you emails 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.
- Use mediums that are effective in your workplace (emails, newsletter articles, parties, gifts, letters, etc.) to highlight contributors of a certain level.
- Publicize results and reiterate the impact of gifts to all employees.



### BRIGHT IDEAS

In 2019, Vistra Energy's Kickoff event had company leadership participating in "Vistra's Got Talent."

Federal Reserve Bank had a patio party to celebrate their campaign success. Activities included a pie in the face booth for their Senior Leadership, food, smores, music and a cornhole tournament championship.

## GIVING OPPORTUNITIES

Throughout your campaign, employees will pledge to support United Way of Metropolitan Dallas with either a one-time or recurring gift. Contributors can make their gift using the Give United online giving tool or by completing a Pledge Form (available for download in our Workplace Campaign [Toolkit](#)). Each contributor can choose their preferred method of giving:

- **Payroll deduction:** Contributor authorizes your company to make deductions from their paycheck giving and build excitement about the campaign.
- **Check:** Contributor makes a one-time gift by check
- **Credit card:** Contributor makes a one-time or recurring gift using their credit card
- **Non-cash items:** Contributor donates non-cash items such as stocks, cars, property or jewelry

Your United Way relationship manager can help you navigate which options are right to offer to your group.



## GIVING SOCIETIES

United Way Giving Societies are an easy way for contributors to support our community impact work while connecting with other change-seekers in North Texas. Each Giving Society provides access to unique annual events, networking and volunteer opportunities that bring together some of the most influential civic and business leaders in our community.

- **Emerging Leaders (35 and under, \$250+)**
- **Leadership Society (\$1,000+)**
- **Builders Society (\$2,500+)**
- **Tocqueville Society (\$10,000+)**
- **Loyal Contributors (Annual gift to United Way for 10+ years)**

Contributors can request more information on each Giving Society on their pledge form.



# VOLUNTEER OPPORTUNITIES

Volunteering with United Way gives employees a chance to experience firsthand how our work in the community improves access to education, income and health.

During your campaign and throughout the year, employees are welcome to participate in virtual or in-person volunteer events on their own or as a company.

## INDIVIDUAL VOLUNTEER OPPORTUNITIES

Each year, we hold a wide range of volunteer events that span our impact areas. Individuals can sign up for [volunteer opportunities](#) on our website.

## CORPORATE VOLUNTEER OPPORTUNITIES

Your company can also work with United Way to arrange a company-wide Day of Impact, which is a custom volunteer project for groups of 10 to 500 people that strengthens both your team and the community.

Prior to your Day of Impact, United Way will work with you to identify the right project for your group, taking into account your company's budget or sponsorship level, interests and requirements. Then, you will receive a calendar hold containing project details, key contacts and a custom registration link to share with employees. We will handle all the arrangements between your company and the service provider.

During your Day of Impact, a United Way team member will be on site to handle check-in and ensure your experience is a success. With your custom registration link, you can easily capture data, track hours and calculate economic impact.

Interested in learning more? View details about our [sponsored project options](#).

## VIRTUAL OPTIONS AVAILABLE

Contact your United way relationship manager to find out more about virtual volunteer options.



# FREQUENTLY ASKED QUESTIONS

## Q: HOW LONG SHOULD OUR WORKPLACE CAMPAIGN RUN?

**A:** Most campaigns run for one or two weeks. Longer campaigns often take up additional time and resources for both the campaign coordinator and employees. One to two weeks is sufficient to kick off your campaign, get the message out effectively and make your ask without overburdening staff. An exception could be if you are the campaign coordinator at a very large or multi-site company

## Q: HOW CAN EMPLOYEES GIVE?

**A:** United Way offers several options, including payroll deduction, cash, check, credit card and stock. Your United Way relationship manager can help you navigate which options to offer to your group.

## Q: CAN WE COLLECT DONATIONS ONLINE?

**A:** United Way of Metropolitan Dallas offers the free Give United online giving tool to collect your employee donations. This platform offers various levels of customization depending on your company's size and needs and can collect payroll deduction, credit card and e-checks gifts.

For more information, or a demonstration of the site, contact your United Way relationship manager or view our Online Giving Overview in the Workplace Campaign [Toolkit](#).

## Q: ARE DONATIONS TO UNITED WAY TAX DEDUCTIBLE?

**A:** Yes. For additional information, please visit [UnitedWayDallas.org](https://UnitedWayDallas.org).

## Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?

**A:** Most campaigns take place between July and November, but they can happen at a time that is best suited for your organization.

## Q: WHEN DOES PAYROLL DEDUCTION START?

**A:** Payroll deduction usually runs from Jan. 1 to Dec. 31. However, United Way does not set your payroll schedule; it is a company decision.

## Q: CAN EMPLOYEES DESIGNATE THEIR DONATION?

**A:** As a service to donors, we make it possible to specify a non-profit program to receive your donation. However, directly investing dollars to United Way of Metropolitan Dallas goes further to strengthen education, income and health—the building blocks of opportunity—in North Texas.

