



United Way of San Joaquin County

BUILDING A BOLDER FUTURE



EMPLOYEE GIVING IN THE WORKPLACE

Ambassador Tool Kit

INTRODUCTION

WHAT IS OUR GOAL WITH THIS CAMPAIGN AND THIS PACKET?

The United Way of San Joaquin County Workplace Campaign invites people at your company or organization to give back and be part of real change in the community. Employees have the opportunity to donate, volunteer, and advocate for causes that are important to them. This handbook is designed to lead you step-by-step through a United Way Campaign and offer tips and best practices to ensure success for your workplace. Together, everyone can inspire hope and create opportunities for a better tomorrow. That's what it means to LIVE UNITED.

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IMPACT AREAS

EDUCATION

We seek to optimize resources and support to our educational institutions and experiences with the goal of reducing childhood poverty. The goal is to help children and youth achieve their potential through supported learning, mentoring, and partnership that lead to financial stability and independence.



HOMELESSNESS

#EVERYHUMANBEING

Homelessness is a priority for our community. Tackling Homelessness by improving people's economic mobility will help reduce the struggles associated with chronic homelessness. Understanding the root cause of homelessness and addressing those endemic issues with prevention and education we can shed the light on reducing the increasing numbers of unsheltered men, women and children in San Joaquin County.



ENGAGEMENT OPPORTUNITIES

WORKPLACE GIVING

Workplace giving is an easy and effective way to help employees make a difference and show them that their workplace is actively supporting our local community's most important issues. Employees of a company are given an opportunity to support United Way of San Joaquin County by donating a portion of their paycheck.

ELEANOR BY WOMEN UNITED

Eleanor by Women United (EWU) strives to connect and empower young and established women in our community, and together we champion for all women's health, education, and financial security. EWU hosts numerous specialty events each year that help us deliver on the promise of connecting the women of our community so that we can continue to do great things together.

LEADERSHIP GIVING CIRCLE

The Leadership Circle recognizes individuals who exceed the average giving level in our community and make a substantial annual contribution of \$500 or more. By making a leadership gift, you join hundreds of other community members committed to addressing San Joaquin County's toughest challenges.

ALEXIS DE TOCQUEVILLE

Our Alexis De Tocqueville (ADT) giving level was founded in 1984. It consists of an exclusive group of United Way investors, and local philanthropic leaders who have demonstrated the highest level of commitment to improving our community through an annual gift of \$10,000 or more. This annual commitment shows dedication to strengthening your own community, and making it a better world for others.



PROGRAMS

NONPROFIT CAPACITY BUILDING PROGRAM

The Nonprofit Capacity Building Program (NCBP) is a collaborative initiative between the United Way of San Joaquin County and the City of Stockton. This nine-month program aims to enhance the organizational capacity of nonprofits and amplify their efforts to bring about positive change in our community. The completion of this program is comprised on a written sustainability plan for each participating organization.

CONNECTED COMMUNITY NETWORK

The Connected Community Network (CCN) in San Joaquin County launched on February 18, 2020, with the goal to address the social determinants of health and link individuals to social services. United Way of San Joaquin County, Dignity Health, and 211 of San Joaquin County worked collectively to establish the groundwork for community wide outreach which included the creation of the Executive Committee and Community Advisory Group that provides direction for the Connected Communities Network growth and sustainability.

NEXT GEN TO SERVICE

Next GEN to Service is a collaborative initiative between United Way of San Joaquin County, the City of Stockton, and the San Joaquin County Office of Education. The program's core objective is to cultivate the next generation of nonprofit leaders by offering juniors and seniors in high school an immersive experience in the nonprofit sector within San Joaquin County. This is achieved through a combination of student-centered learning opportunities and active board engagement in local nonprofit organizations.

NEST—NONPROFIT ENTERPRISE SUPPORT TEAM

NEST is a vehicle to support our nonprofits and enhance the capacity necessary to affect change in San Joaquin County. The NEST model is a "one-stop-shopping" approach to providing education and training programs that help nonprofits build common approaches to capacity escalation. It offers dedicated workspaces for one-on-one educational guidance, group education, retreats, and flex space for the purposes of providing an academic setting for nonprofit employees, leaders, and their Boards.



ON-SITE AMBASSADOR CHECKLIST

BEFORE CAMPAIGN

- Meet with Leadership & Identify Campaign Date
- Recruit additional Ambassadors
- How will staff attend?
- Large or small meetings?
- Prep Pledge Forms
- Secure employee incentives
- Review Digital Toolkit
- Send out invitations

1 WEEK OUT

- Send out reminder to staff
- Confirm leadership will attend and speak
- Confirm speakers & marketing materials
- Send out reminder email about kick-off
- Update Project Manager with number of RSVP's

DAY OF KICK OFF

- Resend Invitation
- Ensure Powerpoint is up and running
- Track all check / cash gifts
- Reminder —One time giving also available through online link
- Hand out marketing material
- Hand out pledge forms
- Campaign will run for 2 weeks
- Ready. Set. INSPIRE!

CAMPAIGN CLOSE & FOLLOW UP

- Ensure everyone had a chance to give
- Discuss campaign matching
- Volunteer Opportunities
- Review campaign numbers & submit campaign envelope
- Send out Thank you email

For more information about United Way of San Joaquin County call 209-469-6980 or visit unitedwaysjc.org



VIRTUAL AMBASSADOR CHECKLIST

BEFORE CAMPAIGN

- Meet with Leadership & Identify Campaign Date
- Recruit additional Ambassadors
- How will staff attend online?
- Large or small meetings?
- Prep Pledge Forms
- Secure employee incentives
- Review Digital Toolkit
- Send out invitations

1 WEEK OUT

- Send out reminder to staff
- Confirm leadership will attend and speak
- Ensure online pledge form is up and running
- Send out reminder email about kick-off
- Update Project Manager with number of RSVP's

DAY OF KICK OFF

- Resend Invitation
- Make sure online link is working
- Track all check / cash gifts
- Reminder —One time giving also available through online link
- Send out complete digital toolkit to staff
- Campaign will run for 2 weeks
- Ready. Set. INSPIRE!

CAMPAIGN CLOSE & FOLLOW UP

- Ensure everyone had a chance to give
- Discuss campaign matching
- Volunteer Opportunities
- Review campaign numbers & submit campaign envelope
- Send out Thank you email

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ROLLOVER

We understand that everyone's situation is unique and Rollovers allow employees to automatically continue to give, especially for those employers who prefer virtual campaigns. As always, we appreciate your continued support of United Way of San Joaquin County.

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and billing) from the previous year's campaign and automatically rolls it over to the current campaign including gift amount, type of pledge and any designations, unless any changes are specified by the employee. Any gifts that were made via cash, check or credit card are not eligible for rollover and would need to be made by the employee as a new gift. Any employee always has the option to make changes to their gift including an increase, decrease or other adjustment based on their personal situation

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WHAT STEPS ARE INVOLVED?

- Complete and submit the rollover form. Attached to this packet is the rollover form to provide us with all the details needed to get started.
- Determine a point person for employees to contact regarding changes to their gifts or renewals for cash, check or credit card gifts.
- Reach out to new employees that have joined since the end of your previous campaign. Provide new staff with an online pledge form and marketing materials.
- Remind employees to submit an United Way online pledge form for any new employees or changes for existing donors.



ROLLOVER

ROLLOVER CAMPAIGN CONFIRMATION

Our company/organization will implement a Rollover Campaign for the 2023 Annual Campaign. We understand that this means all employee payroll and bill me pledges submitted for the 2022 year will be continued for 2023, including designations, unless otherwise notified by the donor of any changes.

COMPANY/ORGANIZATION NAME: _____

CAMPAIGN COORDINATOR CONTACT: _____

EMAIL: _____

PHONE: _____

SIGNATURE: _____

DATE: _____

Return confirmation form to your United Way and contact your Project Lead, Najja Haynes, at nhaynes@unitedwaysjc.org.

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TIMELINE

STEP 1: HAVING THE CONVERSATION

Meet with your United Way Project Lead to explore upcoming themes and materials and also to review past giving. Develop Campaign goals and identify opportunities and possible challenges. Be sure to draft out specific strategies to meet proposed goals.

Meet with your CEO/Senior management to gain their buy-in and support. This will be key since you will want their help and endorsement when it comes to launching your campaign. Gain approval for recruiting workplace ambassadors and holding campaign planning meetings on company time.

Things to consider: What causes are important to your organization? What issues will they get behind? Do you want to survey your employees in advance?

Recruit Other Workplace Ambassadors who represent key departments, and all levels of your company/organization — Your United Way Project Manager will schedule an ambassador training to educate ambassadors on United Way's role in the community and the key components of a workplace giving campaign.

Discuss with your team: What will be the best option for giving in your workplace? Whether it be Online Giving or paper pledge forms.

Delegate tasks to your Workplace Ambassadors — Event planning, set-up, employee engagement, and securing incentives.

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TIMELINE

STEP 2: PLANNING

Layout Campaign Kick-off plan: When will it start/end? What is the theme? Are there employee incentives? What are your key messages? See pages 4 & 5 of this document for complete checklists.

Employee incentive ideas: Casual dress day, VIP parking space, Half day off, shirts, giveaways, event tickets, movie tickets, sleep in for a day, leave early.

Event suggestions: Company cookout, pot-luck, and raffles, (make it a company fundraiser).

Finalize your company's goals and strategies and present to CEO/Senior management & United Way Project Lead. Collaboration for this piece is important, you want to be sure that everyone participating in this campaign is on board with your expectations and goals.

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STEP 3: EXECUTING

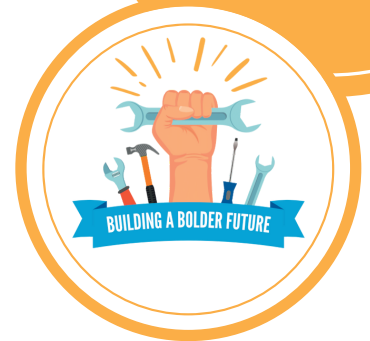
Notify your United Way Project Lead what campaign materials you will need. Email Templates, Brochures, pledge forms, giveaways, etc.

Begin publicizing your campaign: Send out a reminder email about the campaign Kick-off event to all employees. Place payroll stuffers, flyers around the work areas.

Prepare your CEO announcement video, have your CEO also send out an email/letter to all employees urging them to give to United Way and why they believe in the UW mission.

Post any workplace marketing material on your company's social media outlets.

Now that you've built some momentum for your Workplace Campaign, be sure to review all details and tasks regarding the campaign with your Workplace Ambassadors. Keep everyone in the loop with your plan for a successful campaign.



TIMELINE

STEP 4: KICK-OFF

Host your company wide Kick-off Event: Will there be a specific speaker? Leadership from your company to say a few words. Create a short run of program for your launch.

UW Project Lead: Present United Way to all employees, talk about the mission, BOLD moves and impact of every dollar given to our community nonprofits.

Distribute pledge forms to all employees (for paper campaigns), or launch online pledge form for an online giving option.

The United Way Project Lead should be available for Ambassadors and employee questions.

Thank your CEO/Senior Management for their support and EVERY EMPLOYEE for participating in the campaign.

STEP 5: CAMPAIGN WRAP-UP

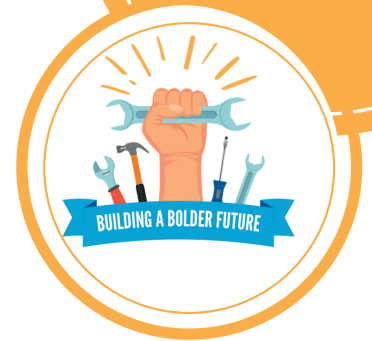
Collect all pledge forms even if your colleagues did not contribute to the campaign. Collecting all pledge forms will confirm that all employees had the opportunity to give. Work with your HR support to confirm all employees who made a contribution to UWSJC. Save all unsigned pledge forms for a second wave.

Take care of any corporate contributions or matches on employee giving.

Announce final campaign results to everyone! Use a town hall style meeting to show the campaign goals, and your success in achieving those goals. Review total amount collected, and what proposed non-profits their money will be directed to, such as Health, Education, Homelessness, or other categories of charitable dollars confirmed. This will create immediate impact! On the United Way side, social media will be active in posting content pertaining to events, initiatives and any update on how dollars are being used.

Time to celebrate and thank every employee for their contribution. Handwritten notes, public acknowledgement, or email blasts are a great way to acknowledge support. Be sure to track employees who gave the most, for purposes of future United Way donor recognition events.

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TIMELINE

STEP 5: CAMPAIGN WRAP-UP

Send out one last email to employees thanking them for their participation—this email should have United Way contact information, volunteer opportunities etc.

Thank Workplace ambassadors for all their work. Recognize all who contributed!

Hold a Campaign debrief meeting. Gather together your ambassadors to ask: What went well?

Areas of opportunity? Goals for next year, identifying other coordinators/ambassadors. How can this Workplace campaign be better?

STEP : YEAR-ROUND ENGAGEMENT

Encourage everyone to sign up for newsletter and follow United Way on social media to stay up to date with what United Way is doing.

United Way volunteer opportunities: Does your workplace want to volunteer at local non-profits? Or put on their own give back day? Talk to your United Way Project Lead for more information.

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