

# UNITED IN PURPOSE

---

---

---

# 2023 United Way Keyperson Guide

INTRO

Thank you to all Keypersons and Workplace Campaigns who contributed to our 2022 United Way Campaign! By working together, we mobilize the caring power of our entire community to give all of our neighbors a chance to thrive.



**We're United in Purpose!** Thank you for joining in.

Your role as a United Way Keyperson is essential in harnessing the power of our community to do the work that no single organization can do alone. Your efforts as Keyperson will help ensure that people's basic needs are met, our region's youth are supported, families have what they need to succeed, people can find and access mental health and substance misuse treatment, and workers get, keep and grow stable and rewarding jobs.

Your United Way Campaign is amplified by the power of our entire network of volunteers, donors, workplaces and community members to make an even bigger impact. We can't do this alone, but we can do it with your help.

**United in Purpose, we have what it takes to support each other and get through even the most difficult of times.**

This guide provides you with a menu of giving tools so you can choose what's right for your organization. We've also provided a checklist to help you get organized, stay on track and finish strong.

You can do this! And we're here to help every step of the way.





### PRE-CAMPAIGN

- ☐ **Work with your Account Manager**
- ☐ Set campaign dates
- ☐ Set fundraising goals (i.e., participation rate and/or dollars raised)
- ☐ Select pledge option
- ☐ Notify colleagues of upcoming campaign dates
- ☐ Ask for support from colleagues



### DURING YOUR CAMPAIGN

- ☐ Have a kick-off event and encourage attendance
- ☐ Consider incentives to increase participation
- ☐ Be sure to include retirees
- ☐ Publicise your campaign internally
- ☐ Post United Way facts in outreach
- ☐ Ask for support from colleagues



### POST-CAMPAIGN

- ☐ Celebrate your results with your colleagues and community!
- ☐ Share your results with your payroll department (United Way can help!)
- ☐ Campaign closing meeting with Account Manager
- ☐ Stay connected with your Account Manager - ask about year-round engagement tools, like educational events, volunteer opportunities & more!

Please choose from the following virtual pledging options for your campaign:

1. **E-PLEDGE LITE** (2 weeks advance notice for setup)
  1. The workplace provides a list of employees and email addresses.
  2. Every employee receives a unique log-in that connects them to their existing account with pledge history.
  3. There is a built-in email function so reminders and communications can be sent.
  4. All pledge options are available.
  5. You are able to see real-time results.
2. **FULL E-PLEDGE** (new E-Pledge campaigns require 8 weeks advance notice for set up. Former E-Pledge campaigns require 4 weeks notice.)
  1. This option provides all the same functions as E-Pledge Lite but with additional customization options.
3. **E-PLEDGE EASY AS 1-2-3** (3 days notice for setup)
  1. This option allows new organizations (or organizations that do not provide employee files) that are interested in running e-Pledge campaigns to register online.
  2. Organizations will provide information such as name and address, contact person, the number of employees, etc.
  3. An automatic email is sent to the individual who performed the registration when their campaign registration application has been approved, so the company can get started on their e-Pledge campaign.
4. **FILLABLE PDF PLEDGE FORM** (no advance notice needed)
  1. The pledge form is provided to the workplace.
  2. The pledge form can be attached to an email from the Keyperson encouraging colleagues to give.
  3. All forms are collected and submitted to United Way by the Keyperson or designated
  4. person within the organization.
  5. All pledge options are available.
  6. This is easy to implement for organizations with less than 10 people.

### FOUR-YEAR CAMPAIGN HISTORY REPORT

Prior to kick-off, Keypersons and campaign committees will be provided with a four-year campaign history report detailing information about the organization's past giving history, including participation rates, number of donors at the leadership level and per capita employee giving.

### SAMPLE REPORT

#### 2022 CASE FOR CARING

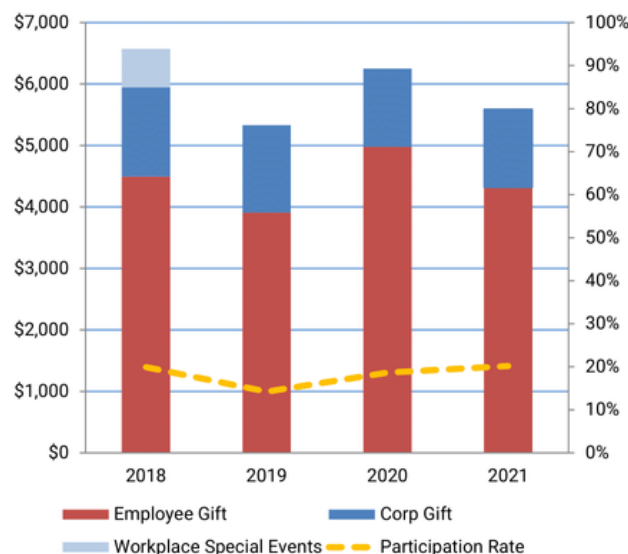
United Way Partner Company

#### GIFT HISTORY



United Way of  
Northwest Vermont

	2018	2019	2020	2021
Corp Gift	\$1,450	\$1,425	\$1,275	\$1,275
Employee Gift	\$4,495	\$3,908	\$4,978	\$4,318
Workplace Special Events	\$627	\$0	\$0	\$0
<b>Campaign Total</b>	<b>\$6,572</b>	<b>\$5,333</b>	<b>\$6,253</b>	<b>\$5,593</b>
Number of Employees	221	225	225	228
Number of Donors	44	32	42	46
Participation Rate	20%	14%	19%	20%
\$ Total Leadership Gifts	\$0	\$0	\$0	\$0
Number of Leadership Donors	0	0	0	0
Average Gift	\$102	\$122	\$119	\$94
Per Capita Employee Gift	\$20	\$17	\$22	\$19
Per Capita Corporate Gift	\$7	\$6	\$6	\$6



All of our Fundraising Ideas can be done in-person, virtual, or hybrid. Keep in mind that all these events can be done for free, or you can use them as an additional fundraising opportunity. For example, employees could pay \$10 to be part of an on-line fitness class. All those who donate at least \$5 a paycheck could be invited to a virtual happy hour with the CEO. For additional ideas or ways to turn these ideas into fundraisers, contact your Account Manager.

1. Host virtual or in-person activities or lessons and consider charging \$5-\$10 donations to participate.

- Cocktail lesson from a mixologist
- DJ Class
- Dance lessons for couples
- A group workout or chair yoga class
- Wine tasting
- Flower arranging
- Cooking class
- Step by step painting class

- **Bright Idea:** Ask the CEO to join these activities to show their support of the Campaign.



2. Book a musician or a magic show for employees to watch online with their kids or family.

3. Have a LEGO build competition where the most votes wins. Consider letting the employees' kids have a category as well.

4. Raffles for PTO or gift cards to local restaurants.

5. Run a virtual or in-person 5k. Participants agree to run the same distance on the same day. Times are submitted to a designated person and the fastest time wins. Consider having age categories like an in-person 5k.

6. Raffle for a virtual or in-person happy hour with the CEO.

- **Bright Idea:** Everyone who pledges during the campaign is entered into the raffle. This encourages recurring gifts rather than one-time smaller donations.

7. Virtual or in-person dinner with your coworkers or company leadership sponsored by your company.

8. Zoom Bingo or Trivia competitions.

9. Host an Xbox or Playstation video game tournament.

- **Bright Idea:** Ask the CEO to play the winner or play employees for their donation of \$10 a game.



10. Challenge co-workers to a lip sync competition.
  - **Bright Idea:** The video with the most votes (\$5 donation) wins.
11. Provide employees three ingredients to use in a cooking competition. Consider categories like most creative, most beautiful, and most inedible.
12. Have a talented colleague host a Family Paint Night. Compare paintings at the end of class to see how they all turned out.
13. Host a Mini Golf Design Competition. Each participant designs a hole with household objects and shares via video or in-person. Award prizes for most creative, most challenging, most detailed, etc.
  - **Bright Idea:** Consider asking competitors to pay an entrance fee to compete.
14. Do a Corporate Step Challenge. Have the CEO pledge a gift or corporate gift if employees can all work together to reach a certain number of steps within a week.
15. Consider a Virtual or in-person Book Club with \$10 dues.
16. Host an amateur art or photography festival and have participants enter their art. Turn it into a contest, where attendees can give \$5 to cast votes for their favorite films and photos.
17. Choose a day to wear a costume from your closet on a video call, in-person meeting, or hybrid meeting with coworkers. Best costume wins a prize!
18. Know a local celebrity or friend with a unique pet? Ask them to crash a meeting.
19. Have employees donate items to an online or in-person yard sale with proceeds benefitting United Way.
20. Cutest Pet Contest – have employees submit photos of their furry friends and the one with the most votes wins.
21. Baby Photo Contest – Have employees submit photos of themselves as a baby and whoever guesses the most correct wins.
22. Pumpkin Carving and Decorating Contest – Put those creative skills to the test against your coworkers by entering your best creations.
23. Golf Ball Drop – Employees can purchase marked golf balls to be dropped and the one closest to the pin wins a prize/prizes.
24. Email Bingo – Employees can purchase bingo cards and numbers are emailed out at various times throughout the campaign time until someone has BINGO.



### YOUR NETWORK OF SUPPORT

United Way staff is here to work with CEOs, Keypersons and campaign committees to plan, manage and revitalize workplace campaigns. The staff are prepared to make presentations to employee groups of all sizes regarding the role United Way plays in identifying and addressing our region's highest priorities.

Your United Way staff are available to support you throughout your campaign and year-round. They are your liaisons to United Way and are a great resource for tips, creative ideas, technology support, materials and best practices.

If you need help with your campaign, connect with your United Way Account Manager or another staff member



Find and download campaign tools at [UnitedWayNWVT.org/campaign-toolkit](https://UnitedWayNWVT.org/campaign-toolkit)

### UNITED WAY STAFF CONTACTS:

**LIZ GAMACHE**

DIRECTOR OF BUSINESS DEVELOPMENT  
& DONOR RELATIONS  
802-861-7843  
[lizg@unitedwaynwvt.org](mailto:lizg@unitedwaynwvt.org)

**CINDY ELCAN**

DIRECTOR OF DONOR RELATIONS OPERATIONS  
802-861-7842  
[cindy@unitedwaynwvt.org](mailto:cindy@unitedwaynwvt.org)

**CARI KELLEY**

WORKPLACE DONOR RELATIONS MANAGER  
802-861-7851  
[cari@unitedwaynwvt.org](mailto:cari@unitedwaynwvt.org)

**AYESHAH RAFTERY**

MAJOR GIFTS AND PLANNED GIVING MANAGER  
(802) 861-7831  
[ayeshah@unitedwaynwvt.org](mailto:ayeshah@unitedwaynwvt.org)

**ERIN REGAN**

CORPORATE ENGAGEMENT MANAGER  
(802)-861-7832  
[erin@unitedwaynwvt.org](mailto:erin@unitedwaynwvt.org)

**DANIEL RAI**

DONOR RELATIONS ASSISTANT  
802-861-7830  
[daniel@unitedwaynwvt.org](mailto:daniel@unitedwaynwvt.org)





## NOTES

---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---