



# CAMPAIGN FUNDAMENTALS

The 2022 Employee Campaign Manager's Guide to Running a Successful Giving Campaign



**United Way of North  
Central New Mexico**

*Serving Bernalillo, Sandoval, Santa Fe, Torrance,  
and Valencia counties*

# Welcome to your United Way of North Central New Mexico Campaign!

United Way of North Central New Mexico (UWNCNM) appreciates your time, creativity, and commitment to make the annual giving campaign at your workplace a success. We want to do everything possible to help you reach your campaign goals. This packet contains a multitude of suggestions, strategies, and tips to help you plan and promote your campaign.

You can download this guide here: [uwncnm.org/workplace-toolkit](https://uwncnm.org/workplace-toolkit) and find additional Employee Campaign Manager (ECM) resources including sample emails, logos, and much more! It's the easiest and quickest way to access tools to help you succeed—just click and go! Please be sure to share our website with your co-workers; it's a great way for them to learn more about UWNCNM and our work.

Thank you for helping our community by bringing talent, passion, and leadership to your United Way campaign.

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# About UWNCNM

United Way brings the power of donors, volunteers, and community service agencies together to create systemic change. UWNCNM has served the four-county region of central New Mexico since 1934. We are able to achieve our mission with the support of:

- Over 15,000 donors
- Over 88 Cornerstone Partners
- over 200 workplace campaigns
- over \$15.4 million raised

**Our goal for the 2022 Campaign is to increase funding for the mission of United Way of North Central New Mexico. Gifts to our work are integral to this.**



**Our mission is connecting people to opportunities and services to equitably improve lives and strengthen communities.**

# RISING TOGETHER

## Cradle-to-Career Initiative

We are working to improve lives by increasing family stability and educational attainment in central New Mexico. By providing support that improves outcomes for all families, we will help assure our communities thrive and carry that success from generation to generation.

### Families Build a Foundation

Families create a foundation for lifelong health, learning, and social and emotional well-being. Young children are supported by services, communities, and families. They begin kindergarten ready to learn.

### Students Achieve in School

Students are resilient, safe, and curious and are supported by services, communities, and families. They develop a foundation for lifelong health, social and emotional well-being and a curiosity for learning beginning in kindergarten and continuing through high school graduation.

### Young Adults Succeed in School and Work

Young adults are engaged and attending school regularly and are able to participate in college and career experiences which support post-secondary attainment and a career pathway. Adults returning to college are able to find a pathway for higher education regardless of where they are in life.



### Basic Needs

Basic needs such as shelter, health, food, clothing, and transportation must be met to provide a foundation for all individuals to succeed.

(formerly **MISSION: FAMILIES**)

### Family Stability Strategies

Helping caregivers and service providers build skills through trauma-informed training

Engaging families to help lead the effort in building resiliency

Providing better access to services and breaking down barriers so individuals can succeed

(formerly **MISSION: GRADUATE**)

### Education Strategies

Increasing school attendance and engagement

Creating college and career-exploration opportunities and developing career pathways

Helping adults transition back to school

# Glossary of Terms and Acronyms

**Agency** - A nonprofit organization that is focused on community service work

**CC / Campaign Coordinator / CampCo** - Temporary United Way campaign support staff

**Cornerstone Companies** - Companies that make a corporate donation to support the work of the United Way of Central New Mexico

**CRO / Corporate Relations Officer** - The United Way employee who works with you and your organization to conduct a workplace campaign

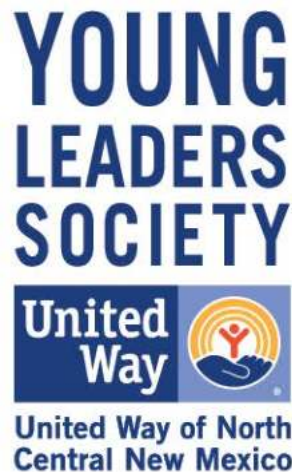
**ECM / Employee Campaign Manager** - You! The employee at an organization who has been chosen to run their workplace giving campaign

**Leadership Donors** - Those who donate at least \$1,000 to United Way each year. Young Leaders Society donors may donate \$500 per year to be considered leadership donors

**Loyal Donors** - Those who have donated to United Way for 10 or more years, any amount

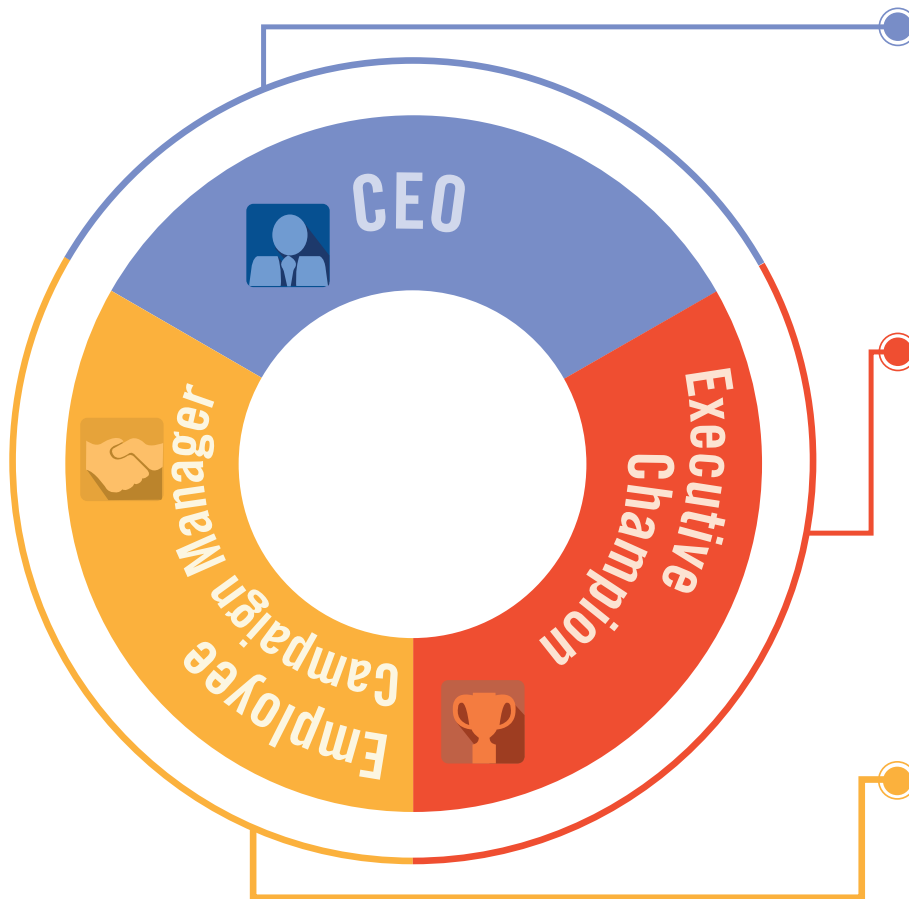
**Campaign Season** - August through December each year

**Donor Group Members** - Those who have actively joined a UWCNM leadership giving group. These include:



# Workplace Campaign Support

There are three key people that make a workplace campaign successful and engaging:



- Identify strong employees to service as **Employee Campaign Manager** and **Executive Champion**
- Work with **Employee Campaign Manager** and **Executive Champion** to set campaign objectives and goals for participation and Community Investment Fund support
- Allow time for training, group meetings, and agency tours
- Approve incentives as appropriate
- Sign endorsement letter to staff for the campaign
- Attend events / meetings as needed by the **Employee Campaign Manager**

- Provide leadership and creative energy for the employee campaign within an organization
- Motivate others to get involved
- Work with **Employee Campaign Manager** and **CEO** to set campaign objectives and goals for participation and Community Investment Fund support
- Sign endorsement letter to staff for the campaign
- Coordinate meetings or events specifically for leadership donors and prospects to thank them and encourage their leadership donations
- Attend events or meetings scheduled by the **Employee Campaign Manager**

- Provide leadership and creative energy for the employee campaign within an organization
- Motivate others to get involved
- Work with **CEO** and **Executive Champion** to set campaign objectives and goals for participation and Community Investment Fund support
- Develop a strong Campaign Team
- Ensure that all employees are provided with informational materials and are given the opportunity to contribute and ask questions
- Help employees understand how their contribution affects their family members, friends, neighbors, co-workers, and other people in their community
- Keep employees aware of year-round initiatives of UWCNM

# Before Your Campaign

## BEFORE GETTING STARTED

1

### Meet and Engage with your CEO

- Send out a personal letter of endorsement from your president or CEO
- Have your CEO participate in your kick-off and the overall campaign
- Discuss a corporate gift, as appropriate
- Discuss and/or develop your campaign budget

2

### Recruit a Committee and Plan your Campaign

- Set your campaign timeline
- Discuss and/or develop your campaign budget (free incentives do exist)
- Ask for help, keep in mind that people who volunteer will lend energy to your campaign
- Decide what your campaign activities will be (presentations, activities, food and prizes) and ask your UWCNM staff member to coordinate presentation speakers
- Assign committee tasks and establish target dates for completion
- Find ways to personalize the campaign

3

### Review and Evaluate Past Performance and Calculate Goals

- Work with a UWCNM staff person and find out about your company's giving history (5 year history and other reports are available for your organization)
- Review last year's campaign and any feedback you received regarding what did and didn't work
- Incorporate new ideas for this year's campaign (see our Campaign Toolkit [uwcnm.org/workplace-toolkit](https://uwcnm.org/workplace-toolkit))

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### Set Employee Goals

- Create a Community Investment Fund dollar goal
- Create a percent participation goal
- Consider a volunteer project for employees.



# Goal Options

## Some Ideas to Consider When Setting Up Your Campaign

Take your campaign to new levels with these strategies:

- **Increase Participation & Average Gift:**
  - “Take A Step” strategy – ask employees to increase their gift by a small amount – from \$5 to \$6 or \$20 to \$22 per pay period or 10% - give examples: \$5.00 to \$5.50 a pay period
  - Incentives and drawings for first-time donors and employees increasing their gifts
  - “One Hour of Pay” per month or pay period or “suggested gift” based on salary levels
  - Early bird pledges
  - Pledging online or turning in pledge form by a certain date
  - Competition between departments for 100% or largest percentage increase in participation
  - “Peer-to-Peer” asks by ambassadors, loyal contributors, donor group members
  - Solicit retirees during campaign and new hires throughout the year
- **Incentives (time off is the most popular)**
  - Angel Day – day off for one hour of pay a month
  - Week of ½ hour “leave early,” “sleep in,” or “longer lunch” passes
  - Casual Day stickers
  - Company logo items, movie tickets, concert tickets, restaurant or other gift certificates

**You are on your way to a successful campaign!**





# During Your Campaign

## COMMUNICATION & CAMPAIGN ACTIVITIES

1

### Publicize your Campaign

- Share how to pledge, when to pledge, and what your pledges support
- Use provided UWNCNM materials (i.e. posters, videos, brochures, pledge forms)
- E-mail communications to raise awareness about campaign activities and events
- Create a section on your company's intranet to share information about UWNCNM and your company's campaign, linking it to UWNCNM's website ([www.uwncnm.org](http://www.uwncnm.org))
- Use incentives to encourage giving
- Let your clients and vendors know you run a campaign on social media

2

### Conduct an Educational Campaign

- Invite UWNCNM staff to present at a large group meeting in person or virtually
- Use a community impact speaker (UWNCNM can arrange this)
- Conduct group presentations for all departments if large meetings are not an option (Remember UWNCNM staff are excited and available to attend all your presentations in person or virtually)
- Ensure every employee receives UWNCNM materials
- Follow up with employees to ensure every employee has been given the opportunity to contribute
- Ask co-workers if they have personal experiences with UWNCNM Community Investment Fund programs and ask them to share their stories— they can inspire others with their stories

3

### Promote Leadership Giving

- Discuss with your CEO Leadership Giving matching opportunities
- Plan with your CEO the opportunity for him/her to recognize leadership donors within the company (i.e. lunch with the CEO)

4

### Ask Everyone to Donate

- Ensure you invite every person to donate by asking your committee and any other advocates to reach out to their co-workers (people say the number one reason they didn't donate is because "they weren't asked")
- Include everyone, both active employees and retirees
- Ask your new hires as part of the HR package
- Inform employees about the ways they can continue to Give, Advocate, and Volunteer
- Ask your co-workers if they have any experience with United Way that they are willing to share
- Consider a group activity or volunteer project

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### Stay Connected

Check our social media for ideas and updates so you can help employees and inspire community interaction

 [www.uwncnm.org](http://www.uwncnm.org)

 @UWNCNM

 @UnitedWayNCNM

 @UnitedWayofNorthCentralNM

 @UnitedWayOfNorthCentralNewMexico

 @United Way of North Central New Mexico

# Communicate

## Group Meeting in Person or Virtually

Group gatherings are the best way to increase understanding of how UWNCNM improves more lives in our community. They offer the following benefits:

- Fewer one-on-one presentations and follow-ups are needed
- Allows the campaign team to make a compelling case for support through UWNCNM
- Employees receive inspiring and motivating information

The meeting sample agenda below can be adapted to your company and time line.

## Sample Group Meeting Agenda

**Total Time: 26 Minutes**

| <b>ITEM</b>  | <b>PRESENTER</b>          | <b>TIME</b> |
|--|---------------------------|-------------|
| <b>Welcome</b> <ul style="list-style-type: none"><li>• Distribute Campaign Materials (brochures, pledge forms, etc.)</li></ul>   | Employee Campaign Manager | 5 minutes   |
| <b>Endorsements</b> <ul style="list-style-type: none"><li>• CEO Endorsement</li><li>• Union Leader Endorsement</li></ul>         | CEO/Management            | 3 minutes   |
| <b>UWNCNM Overview</b> <ul style="list-style-type: none"><li>• UWNCNM and the Community Investment Fund</li></ul>                | UWNCNM Staff Member       | 7 minutes   |
| <b>UWNCNM Community Impact Speaker</b>   | Guest Speaker             | 7 minutes   |
| <b>Ask for a Donation</b>  | ECM or UWNCNM Staff       | 2 minutes   |
| <b>Closing Remarks</b> <ul style="list-style-type: none"><li>• Q&amp;A</li><li>• Thanks</li><li>• Collect Pledge Forms</li></ul> | ECM or UWNCNM Staff       | 2 minutes   |

# Online Pledge Form Options

## Formstack:

- For smaller companies (250 employees or less)
- An online version of the UWNCNM pledge form, which allows for quick turnaround for us to create the online campaign
- A very user and mobile friendly option
- Clean online pledge form where only the necessary options appear to the donor
- Limited donor information is collected on the pledge form

## eWay:

- For larger companies (250 or more employees)
- Is more extensive to set up, so UWNCNM asks for a 3-4 weeks' notice
- Can be used for Regional and National Campaigns
  - UWNCNM will need to communicate with the local UWs so the campaign will be successful at all locations
  - Ensure that your company is willing to provide separate PRD payments to local UWs for processing of their own donors pledges

## Rollover Campaign:

Create a Campaign that automatically rolls over into the next year.

Steps include:

- Complete and submit the confirmation form
- Define your timeline for when you want to run your campaign. Right before your campaign, you'll need to communicate to your employees the details and how they can make adjustments (We recommend about two weeks for notification of adjustments to their gift including designations or to increase giving.)
- Determine a point person for employees to contact regarding changes to their gifts or renewals for cash, check, or credit card donations.
- Reach out to new employees that have joined since the end of your last campaign.
- Submit pledge forms to your United Way contact for any new employees or changes to existing donor gifts at the end of your campaign.

# After Your Campaign

## AFTER CAMPAIGN COMPLETION

1

### Report Results and say “Thank You”

- Recognize individuals, groups and departments that went “above and beyond” during the campaign
- Announce your final results to all employees through a communication from your CEO and/or conduct a finale activity
- Thank everyone at the time of giving—offer a thank you card or small gift from the company for their participation (templates available online)
- Make a “Thank You” display (hang posters, campaign activity photos and mementos of the campaign)
- Give special thanks to your committee (hold a special coffee break at which everyone receives a company “item” and a special thank you from you and the CEO)
- Collect all pledge forms, place them in your provided UWNCNM envelope, complete the information on the front and schedule a pick-up with your UWNCNM representative
- Read the United Way E-Newsletter to keep informed about engagement opportunities in central New Mexico and convey news to the staff
- Invite your Corporate Relations Officer to speak at staff meetings outside of campaign season for community impact stories and updates
- Plan a group/team-building event or volunteer project for a hands-on experience.

## HELP UWNCNM SAY “THANKS”

When you share names and addresses of your donors with UWNCNM, we are able to directly thank them for giving. Donor information is NOT shared with or sold to any other organization. UWNCNM sends acknowledgement letters for pledges via email when possible; it is better for the environment, keeps our administrative costs low, and gives donors electronic access to their pledge information!



**THANK YOU!**

# Delivering Donor Dollars

It is important to follow the guidelines below to ensure that your donor dollars are delivered in a timely fashion. There may be a lapse in agencies receiving funds if we do not have the following detailed information.

## Pledge Form Processing

- The company keeps the white copy of the Payroll Pledge Form
- Do not staple checks or cash to forms – please use paper clips
- There is a \$24 minimum to donate to non-UWNCNM designations
  - Provide as much detail as possible for non-UWNCNM affiliated designations - e.g., Nonprofit EIN #, phone, address
  - There is a 10% minimum required gift for processing donations outside of UWNCNM programs
- For donors who prefer payment by credit card, there is a 3% fee

## Enveloping Pledges

- Companies should provide completed pledge forms to the Corporate Relations Officer or Campaign Coordinator in a timely manner
  - This is especially important when there are checks included as donors are expecting their checks to be deposited soon after donating.
- **Do not** staple checks or cash to forms

## Information Needed from the Company

- Who to contact about pledge forms when they are missing, need correcting or other issues
- Company Payroll Department contact
- Payroll payment schedule: bi-weekly, monthly?

## Processing of Payment from Payroll to Designation

Company Payroll Deduction ⇒ Company AP Check ⇒ UWNCNM Receives and Deposits ⇒ Payment Processed ⇒ Designation Paid Out

- Designation payout occurs monthly if the designated agency receives payment through ACH (automatic deposit). If they do not yet have ACH, they will be paid out quarterly by check.
- Tocqueville Donor payouts occur twice a month (ACH and check designations)

*Any delays in any of the above steps will cause a delay in the payment to the designated agency. The biggest reason for delays is not having payroll deduction backup and/or incorrect pledge information.*

## Payments Processing Backup

In order to ensure accuracy in applying payments to the correct donor, Payments Processing will need an employee payroll deduction detail. This should include:

- Company Name
- Payroll Period(s) the deductions occurred
- The Employee ID
- Employee Name (Last, First -in order of last name preferred)
- Amount for the period of deductions

### Example of a Payroll Department backup report for ABC Company:

ABC Company Inc.  
Pay Period: June 2018

| Employee ID | Employee Name (Last Name, First Name) | Pay Amount (Donation) |
|-------------|---------------------------------------|-----------------------|
| 12345       | Doe, John E                           | 10.00                 |
| 12346       | Doe, Jane F                           | 10.00                 |

Total Payment 20.00  
prev payment for John Doe 5.00  
Check Total **\$ 25.00**

If Total Payment doesn't match check total, please explain why.

Please send payment detail in Excel format to [payments@uwcnm.org](mailto:payments@uwcnm.org). It is also okay to send in payment detail with the payment, but if the detail is more than a couple of pages, it's better to email the backup.

If you have any questions about the Payroll Detail Backup format, please contact Kara Cross at [kara.cross@uwcnm.org](mailto:kara.cross@uwcnm.org), or send questions to the payments email above.

Send payments to either:

#### Lockbox Deposit

United Way of North Central New Mexico  
PO Box 25147  
Albuquerque, NM 87125

#### Direct Mail

United Way of North Central New Mexico  
2340 Alamo Ave SE - 2nd Floor  
Albuquerque, NM 87106

# UWNCNM 2022 Campaign Team

We're here to help you and your company run a successful campaign!

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*President and CEO*

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