The Employee Workplace Campaign
What is a Workplace Campaign?

A Corporate Workplace Campaign allows our partners to create team building, offer employees a chance to give back to the community, and highlight the Corporate Social Responsibility goals of your organization.

Companies have the opportunity with UWNYC to create and provide a platform to make contributions through:

- One Time Credit Card Donations
- One Time Payroll
- Paycheck deductions

We can help you determine the best time of year to engage your staff in a giving campaign any time during the year. For example:

- Fall (August-December)
- Spring (March-June)

UWNYC Access & Size

- Open Campaign to include all 501c3 vs. Closed Campaign which highlights UWNYC alongside a few select non-profits
- Nationwide vs. Local

Employee Engagement: An opportunity for your company leaders to play a role including:

- Campaign Captains
- Team Leaders
- Senior Leadership
You’ll be in good company with our network of corporate partners, here.

UWNYC Relationship Managers serve as your company’s guide to navigating the intricacies of philanthropy and will work with you to customize the best engagement opportunities for your business and its employees. If you’re looking to create company-wide engagement that supports our City, drives individual and professional philanthropy goals, or meets your company’s social responsibility objectives, reach out to connect.

To start the conversation, contact Patrick Key, Vice President, Resource Development at (212) 251-2474 or pkey@uwnyc.org.

United Way of New York City Membership Circles:

- Visionary ($500K+)
- Innovator ($250K-$499K)
- Champion ($100K-$249K)
- Leader ($50K - $99K)
- Supporter($10K- $49K)
1. CEO CONTACT
   Involve your CEO in all initial planning. Discuss budget, corporate gifts, and CEO involvement throughout the campaign.

2. RECRUIT
   Recruit a committee to help, set your timeline & budget, and design your campaign. Be creative. Identify campaign activities. Delegate tasks to committee.

3. REFLECT
   Evaluate past campaign performances and calculate a goal. Your United Way rep can help, especially when it comes to incorporating new ideas.

4. SET GOALS
   Discuss the hard numbers and where you want to grow your campaign. Create non-monetary volunteer opportunities.

5. PUBLICIZE
   Share how, where, and when to pledge and incentivize giving.
   - Order Live United shirts - they create a great photo opp!
   - Utilize and distribute United Way campaign materials.

6. CONDUCT CAMPAIGN
   Distribute campaign materials and host a United Way speaker.
   Invite guest speakers from United Way.
   Create learning opportunities through educational campaign activities.

7. LEADERSHIP GIVING
   Recognize leadership gifts and discuss CEO matched donations.
   Tip: Successful campaigns have heavy involvement from leadership, setting an example of participation from the top down.

8. ASK
   Include new hires upon arrival, current staff and leadership, and retirees in the asking process by providing them with pledge forms.

9. REPORT & THANK
   Announce your final results to your organization and your Local United Way in a timely manner, and thank everyone involved!

10. HAVE FUN
    Engage your employees with fun AND meaningful activities, prizes, and volunteer opportunities.

10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN
UWNYC will customize a year-round engagement plan to engage your employees around volunteerism, events and professional development opportunities. Here's a sample.

<table>
<thead>
<tr>
<th>Q1 - 2019</th>
<th>Q2 - 2019</th>
<th>Q3 - 2019</th>
<th>Q4 - 2019</th>
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<tbody>
<tr>
<td><strong>January</strong></td>
<td><strong>April</strong></td>
<td><strong>July</strong></td>
<td><strong>October</strong></td>
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<tr>
<td>1/3 YLC Roundtable</td>
<td>4/10 – UWNYC Self Sufficiency Summit</td>
<td>Friday OUS Field Trips</td>
<td>Community Giving Campaign</td>
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<td><strong>February</strong></td>
<td><strong>May</strong></td>
<td><strong>August</strong></td>
<td><strong>November</strong></td>
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<tr>
<td>2/1 – Resume Review</td>
<td>5/5 – Bike Tour</td>
<td>ReadNYC Site Tour</td>
<td>TBD – Pantry/Kitchen Volunteer Event</td>
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<td><strong>March</strong></td>
<td><strong>June</strong></td>
<td><strong>September</strong></td>
<td><strong>December</strong></td>
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<tr>
<td>3/6 – Women United Luncheon</td>
<td>6/2 – March United (Thrive Group)</td>
<td>TBD - UWNYC Impact Series</td>
<td>UWNYC Holiday Collection</td>
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<tr>
<td>3/26 – ReadNYC Site Tour</td>
<td>TBD – Pantry/Kitchen Volunteer Event</td>
<td>TBD – Pantry/Kitchen Volunteer Event</td>
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<tr>
<td>3/26 – Gridiron Kick Off</td>
<td>TBD – Pantry/Kitchen Volunteer Event</td>
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<tr>
<td>3/28 – Volunteer Project NYCP</td>
<td>TBD – Pantry/Kitchen Volunteer Event</td>
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<td>3/28 - Women United Stewardship Breakfast</td>
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**Bolded Events are Exclusive to Company Employees**
How your Employees can get involved in UWNYC’s Engagement Networks. Learn more, here.

TOCQUEVILLE SOCIETY
The Tocqueville Society council recognizes local philanthropists who are committed to social change through outstanding community service and financial support.

WOMEN UNITED
United Way of New York City’s impact committee Women United is a network of community-driven women dedicated to making a difference in the lives of struggling New Yorkers.

LEADERSHIP CIRCLE
Leadership Circle recognizes trailblazers committed to addressing New York City’s toughest challenges. The support and generosity of this group helps move our fellow neighbors from barely surviving, to thriving.

YOUNG LEADERS COUNCIL
The Young Leaders Council brings the passion and philanthropic power of young professionals together to transform New York City.

THE LEGACY SOCIETY
The Legacy Society offers the opportunity to give through non-traditional channels. Learn how to maximize both your giving potential and the benefits of your donation. Plan for future charitable contributions and be recognized as a UWNYC donor today.
Tools for Campaign Implementation

PRE-CAMPAIGN
• Affirm Management Support
• Build a Strong Campaign Team
• Develop A Campaign Plan
• Strengthen Leadership and Tocqueville Giving
• Promote the Campaign

DURING CAMPAIGN
• Host A Campaign Kickoff
• Make The Ask
• Monitor and Report Progress
• Wrap Up the Campaign

POST-CAMPAIGN
• Say “Thank You”

YEAR-ROUND ENGAGEMENT (ALL YEAR LONG!)
• Encourage and Offer Year-Round Involvement
• Speakers and Tours
Event Ideas: Virtually and In-Person

SAMPLE EVENTS PLAN
Events are a great way to engage employees during the campaign as well as throughout the year.

ONGOING EDUCATIONAL COMMUNICATION

<table>
<thead>
<tr>
<th>minimum engagement</th>
<th>maximum engagement</th>
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<tbody>
<tr>
<td>Kick-Off Event</td>
<td></td>
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<tr>
<td>1-2 Thank You Events</td>
<td></td>
</tr>
<tr>
<td>Leadership or Affinity Group Strategy</td>
<td></td>
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<tr>
<td>Community Day(s) of Service</td>
<td></td>
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<tr>
<td>Year-Round Volunteering, Sponsorships, and Affinity Group Involvement</td>
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</tbody>
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CAMPAIGN EVENTS

- Kick-Off Event
- Pacesetter Events

EMPLOYEE EDUCATION AND COMMUNICATIONS

- Lunch and Learns
- Site Tour
- Community Based Organization Speaker

VOLUNTEERISM

- Day of Service
- On-Site Volunteerism
- One-Time Volunteer Events

TARGETED AUDIENCE ENGAGEMENT

- Female Employees
- Young Professionals
- New Employees

BRAND AWARENESS AND SPONSORSHIP

- Women’s Leadership Council
- Young Leaders Council
UWNYC is transforming its corporate engagement model from one defined by traditional workplace giving campaigns and transactional engagement to that of year-round, purpose-driven, shared visions for employee engagement and community impact. This transformation is informed by a hybrid-advisory 4-D model, where UWNYC serves as advisor, architect and implementation partner.
Strategic Initiatives Partnership Development Timeline

**Kickoff**
Align on Diagnosis phase objectives and approach

- Prepare data collection materials & events
- Conduct interviews, focus groups & surveys
- Conduct external research
- Analyze data & prepare presentation

**Diagnose**
Collect and analyze data

**Share Learnings**
Share Diagnosis phase findings & discuss promising solutions

**Activate and Align**
Align on proposed corporate engagement programs and prioritize

- Deploy first phase of the customized corporate engagement program
- Activate employees year-round
- Track progress and key performance indicators
- Refine solutions

**Design**
Devise solutions & plan

- Design customized corporate engagement programs
- Devise solutions that maximize business value, employee engagement, and social impact
- Map out path to easy wins and longer-term solutions
- Develop measures of success and key performance indicators

**Deploy & Drive**
Implement, test, and adapt

Regular check-ins
Employee Engagement Menu

• **Transformational Volunteerism**
  • Impact-driven
  • Skills-based

• **Employee Resource Group Engagement**
  • Internal capacity building
  • External networking and resourcing through Women United & Young Leaders Council

• **Talent and Leadership Development**
  • Loaned Executive Leadership Program. Learn more [here](#).
Leadership and Engagement

**Strengthening Partnerships**
- Help grow campaigns, volunteerism and affinity group engagement
- Connect UWNYC with new campaign opportunities
- Call Tocqueville members and complete a cultivation visit with a UWNYC team member
- Host Tocqueville “thank you” receptions, events, meetings with current and potential step-up donors

**Problem Solving**

**Cultivating Donors**
- Speaking at Corporate Partner presentations
- Meetings with Corporate Campaign Contacts
- Personalized Thank you

**ENGAGEMENT**

**STEWARDSHIP**