

Workplace Campaign Education & Group Solicitation

Group education and solicitation is the most efficient and effective method of reaching your goal of contacting every employee in your business. We suggest group meetings, where employees come together to hear a presentation on United Way and afterwards each is asked to make a pledge. This solicitation method has been proven to improve results, and considerably cut down on one-on-one follow-ups.

Pre-planning:

1. Set up a time, place and meeting agenda
2. Make arrangements for a United Way Speaker
3. Publicize the meeting well in advance
4. Ensure that all pledge forms and campaign brochures are available for distribution
5. Have food and have fun!
6. Follow-up with those who did not attend the meeting

Agenda:

Below is a sample agenda for a United Way group solicitation meeting that you should review with the group's manager before the meeting. An effective meeting should require no more than 15 to 20 minutes. The following is a suggested agenda outline.

Step 1: Welcome and campaign endorsement by campaign coordinator. (1 minute)

Thank employees for attending, distribute personalized pledge forms and campaign brochure. **Remind employees to sign and turn in forms when they leave (1 minute).**

Step 2: United Way Presentation (5-6 minutes)

- a. Explain how United Way works and why you give to United Way (See “Elevator Speech” in the back of this Manual)
- b. Point out that United Way funds support dozens of local funded non-profits that are carefully vetted and selected.
- c. Be sure to focus on the ALICE population! (See: “Need in Our Community”)



United Way of
Collier and the Keys

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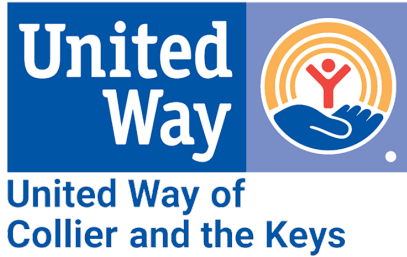
- d. Explain how their dollars are making a genuine impact by helping the community through United Way, a community leader in identifying and solving local problems, because it acts as a bridge connecting your resources with the people most in need. (See: “**How You Can Help/Why United Way**”)

Step 3: Review incentives and discuss payroll deduction option and pledge form. (1-2 minutes)

- Not all incentives will work for every business and company, therefore, tailor incentives accordingly
- Contact [our Development team](#) for a list of incentives and to brainstorm what will work best for your employees

Step 4: Make the Ask/Conclusion (2-3 minutes)

- Sample scripted ask:
 - i. “If you have participated in the campaign last year, I want to thank you for your support and ask that you consider increasing your contribution for this year’s campaign”
 - ii. “If you have chosen not to participate in the past, I encourage you to please join me and other Collier and Monroe County businesses in working together to make our community a better place by making a contribution to United Way today”



Workplace Campaign

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Education and One-on-One Solicitation

The second form of education and solicitation is a one-on-one approach, where individual employees are contacted and asked to make a pledge. The following 5 step approach is the most effective one-on-one solicitation technique:

Step 1: Make Your Introduction and Opening Comments

- Explain how United Way works and why you volunteer for United Way (See “Elevator Speech”)
- Point out that United Way funds support dozens of local funded non-profits that are carefully vetted and selected.
- Be sure to focus on the ALICE population!
- Note that United Way is a community leader in identifying and solving local problems, working in partnership with other community and civic organizations to make best use of limited resources.

Step 2: Answer Questions

Answering questions about United Way gives you the opportunity to tell your fellow employees more about the work of United Way.

If you are asked a question that you cannot answer, please send our Development team an e-mail at Development.Associate@uwcollier.org
We will get the answer to you quickly so you can follow up as soon as possible.

Step 3: Explain the Pledge Form and Incentives

Step 4: Ask For the Gift

You've answered the person's questions and explained the pledge form and incentives. Now you're ready to ask for the pledge. **Again, encourage each person to give a payroll deduction “fair share” gift and to give as generously as possible. A “fair share” gift is one hour’s pay per month.**

Step 5: Say Thank You

Thank the person for his or her time and gift. Assure the individual that the contributions will be used to help people in need in our community.