



# **United Way**

## **Employee Campaign**

### **Coordinator Handbook**



**United Way  
of Greater St. Joseph**

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**THANK YOU** for serving as an Employee Campaign Coordinator (ECC) for your workplace.

As an Employee Campaign Coordinator, you are the United Way Champion for your workplace. You know your colleagues, and understand what matters to them and what type of appeal would resonate most with them. Your role is to plan, coordinate and implement an effective workplace campaign. This may sound daunting, but don't worry...you are not alone. We are here to help! Between the ECC Handbook, available campaign materials and United Way staff, we have you covered!

As an ECC, you bring the work of United Way to life—in board rooms and breakrooms, at lunch tables, in safety and leadership meetings, in conversations with co-workers and through campaign activities of all kinds. You educate your peers about why United Way is an effective way to make a big difference in our community, and you inspire them to do something about it.

Please feel free to reach out to Renita Neville ([renita.neville@stjosephunitedway.org](mailto:renita.neville@stjosephunitedway.org) or 816.364.2381) with any questions or for assistance.

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# United Way Overview

United Way of Greater St. Joseph is a local non-profit organization whose mission is to **improve lives through the caring power of community**. By bringing together social service agencies, businesses, individuals and volunteers, we are able to work toward creating lasting change in our community. United Way focuses on three core areas: Education, Health and Financial Stability. By funding 16 Partner Agencies who provide programming and services in these areas, and by developing and maintaining local Initiatives, United Way impacts thousands of lives each year. The heart of United Way is the community: the volunteers, the advocates, the donors and you. Without all these people, the work of United Way and our Partner Agencies would not be possible.

A few facts about United Way:

- United Way is governed by a Board of Directors comprised of more than 30 community members who volunteer their time.
- The United Way Board oversees financial activities, the annual fundraising campaign, allocation of dollars secured through the fundraising campaign and Initiatives led by United Way.
- Allocation of dollars raised through the annual fundraising campaign are based on recommendations of more than 100 community members. These volunteers review and evaluate each United Way Partner Agency, taking into account program quality and effectiveness, board and agency governance, marketing and communications and financial accountability and stability.
- More than 200 volunteers participate in raising annual campaign funds each year. Approximately 22% of the annual funds raised come from businesses giving corporate gifts, 59% from individuals giving through workplace campaigns and the other 19% comes from individuals not associated with a workplace campaign, trusts, foundations and special events.
- United Way employs 6 full time and 3 part time staff.
- United Way depends on the time and energy donated by hundreds of volunteers each year to accomplish goals.
- Management/general and fundraising costs are kept very low– more than 90 cents of every dollar received by United Way is used to support partner agencies, programs and initiatives.



**stjosephunitedway.org**



# Seven Simple Steps for a Successful Workplace Campaign

**Congratulations! You did it!**



**#GiveHope**

**#joinUnitedWay**

**#7**

**Keep Co-Workers Informed Year Round About How Their Gifts Are Making A Difference In Our Community**

*\*See page 7 for more information*

**#6**

**Thank Your Co-Workers For Their Generosity**

*\*See page 7 for more information*

**#5**

**Report Your Results To United Way**

*\*See page 7 for more information*

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**Run Your Campaign**

*\*See page 7 for more information*

**#3**

**Plan Your Campaign**

*\*See pages 5 & 6 for more information*

**#2**

**Become An Informed Champion**

*\*See page 5 for more information*

**#1**

**Get The Support Of Your CEO And Co-Workers**

*\*See page 5 for more information*

# Making Your Campaign a Success

## Getting Support

- ⇒ Work with your leadership to get support for a corporate gift and to recruit a team of co-workers to help with the campaign.
- ⇒ Consider colleagues from various departments, roles, and levels of experience working on the campaign—a diverse team will bring varying skillsets and improve the creativity and effectiveness of your team.
- ⇒ Invite Renita to participate in committee meetings.

## Becoming An Informed Champion

- ⇒ Learn more about the programs and services provided by United Way's 16 Partner Agencies and 6 United Way Initiatives in our Resource Guide available at [www.stjosephunitedway.org/united-way-publications](http://www.stjosephunitedway.org/united-way-publications).
- ⇒ Review the history of your campaign. Past results can be obtained by contacting Renita. Look for areas of potential and set one or two specific goals of things you'd like to achieve in in this campaign.
- ⇒ Review the United Way campaign materials and resources found at [www.stjosephunitedway.org/workplace-campaign](http://www.stjosephunitedway.org/workplace-campaign).

## Planning Your Campaign

- ⇒ Create awareness about United Way and the campaign building up to your meeting:
  - Share flyers or digital slides showing program outcomes demonstrating how donations are used to positively impact lives and/or notifying co-workers of your United Way campaign rally. Post them in high traffic or common areas. See *Impact Slides* on the United Way campaign webpage or contact Renita for customized versions.
  - Ask employees to share their United Way experience with co-workers.
  - Purchase United Way t-shirts and take photos of employees in the shirts, and ask them how they LIVE UNITED. Post the photos and statements on the company intranet or social media accounts.
  - See *Incorporating Social Media* on the United Way campaign webpage for more ways to use social media for your campaign.
- ⇒ Determine when and where campaign rallies will be held. **Some of the most effective meetings are held during already scheduled employee meetings i.e. safety meetings, department meetings, town halls, toolbox meetings, all-staff meetings, etc.**

# Making Your Campaign a Success

## Planning Your Campaign (continued)

⇒ Create the agenda for your rally.

- Consider what would resonate most with your co-workers.
- Identify if there is a co-worker that has a United Way story that they would be willing to share. Stories are most meaningful when those listening can relate in some way to the person telling their story.
- Check out the latest campaign video on the United Way campaign webpage. In addition to the most current campaign video, a library of past videos are available for use.
- Determine who will make the “ask” for donations.
- Make sure Renita is aware of your rally schedule so she can ensure that you have all the materials and resources you need, and ensure a United Way representative is on hand to assist.

⇒ Make it fun!

- Adapt a well-known game (Jeopardy, Price is Right, Trivial Pursuit, etc.) to incorporate United Way related information. See *Fun-raisers* on the United Way campaign webpage for more ideas.
- Have different departments compete against one another to see which department can raise the most funds or has the greatest level of participation. The winners get bragging rights and/or a prize.

⇒ Work with your payroll department on if and how Continuous Giving will be used. If your organization utilizes Continuous Giving, those employees that are currently donors are not required to complete new pledge forms and their pledges will be automatically carried over to the next year. Utilizing Continuous Giving is easier for both donors and those tasked with following up on and collecting pledge forms.

⇒ Determine who will track returned pledge forms, and who will be responsible for following up with employees that haven't submitted a pledge form.

- **You can dramatically reduce needed follow-up by asking for pledge forms to be returned before co-workers leave the rally.**
- **Some organizations find it helpful to request that all employees submit a pledge form, even if they choose not to donate. This allows the organization to ensure that every employee was afforded the opportunity to participate and may help mitigate an awkward situation when following up if the employee chooses not to give.**

# Making Your Campaign a Success

## Run Your Campaign

- ⇒ Utilize the checklist on page 8 to ensure you have everything you need for a successful campaign.
- ⇒ Execute the plan you thoughtfully created to inspire co-workers to support the work of the United Way Network!
- ⇒ Be sure to thank employees for their time and consideration, and **don't forget to ask them to donate to United Way.**

**Report Your Results** See *How to Complete Your Campaign Envelope* on the United Way campaign webpage for detailed instructions on completing the Campaign Envelope used to report results to United Way.

- ⇒ Contact Renita to return your results to United Way so your organization and employee donors can be recognized.
- ⇒ Deadlines for your results to be included are:

Report results to United Way by:	To be included for reporting at:
August 29 (Pacesetters)	Campaign Kickoff (September 4)
November 3	Campaign Celebration (November 6)

## Thank Your Co-Workers For Their Generosity

- ⇒ Engage company leadership to thank employees for participating in the campaign and/or reaching your defined goals.
- ⇒ A few popular ideas include:
  - A day off with pay for certain levels of giving.
  - Provide a United Way t-shirt or company apparel for donors. United Way t-shirts can be co-branded with a company logo. Contact Renita for details.
  - Offer reserved parking spots for certain levels of giving.
  - Have a raffle for a great prize that donors are entered into.
  - Acknowledge donors on your company website, posters and in newsletters.
  - Bring in lunch and celebrate your generosity as a team.

## Keep Co-Workers Informed About How Their Gifts Are Making A Difference

- ⇒ Ask Renita to update employees throughout the year.
- ⇒ Invite co-workers to attend United Way's Annual Meeting in February.
- ⇒ Have Renita arrange Partner Agency tours for employees.
- ⇒ Contact Renita to set up volunteer opportunities.

## **Campaign Checklist— Are You Rally Ready?**

### **One week prior to your rally have you:**

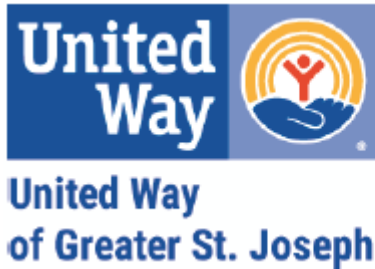
- ☐ Reserved a meeting space?
- ☐ Notified Renita?
- ☐ Practiced showing the campaign video to ensure audio and video work correctly?
- ☐ Let your employees know about the rally?
- ☐ Personalized the payroll deduction pledge forms (if applicable)?
- ☐ Finalized your agenda?

### **On the day of the rally, have you:**

- ☐ Prepared the room that you will be meeting in?
- ☐ Secured a supply of ink pens?
- ☐ Made a copy of your employee list?
- ☐ Checked the audio/video equipment to ensure that they are ready?
- ☐ Confirmed the attendance of management and employees/staff?
- ☐ Reminded supervisors of the scheduled meetings?



# United Way as a Resource for Your Employees



## HOW CAN WE BE A RESOURCE FOR YOU & YOUR EMPLOYEES?

### Do you have employees looking for child care?

We can connect your employees to a list of area child care providers. In addition, we are always trying to better understand gaps in availability and barriers your employees face when trying to find child care so that we can identify potential solutions.

### Do you have employees looking for help?

Through our network of Partner Agencies and connections with other social service providers and area nonprofits, we are happy to help connect you and your employees to resources, programs and services that may be able to help meet their needs.

### Are your employees raising young children?

United Way Success By 6 and our partners offer resources, trainings and events aimed to prepare children to be successful learners when they enter kindergarten.

**United Way of Greater St. Joseph's mission is to improve lives through the caring power of community.**

One of the ways we can help improve lives is to serve as a connector between you, your employees and opportunities, events and resources.

### Are you looking for team-building activities?

Through United Way Volunteer Center, we can help identify volunteer opportunities for you and your team. Volunteering together is a great way to deepen relationships between employees while doing good in the community.

### Do you have an employee on light duty?

United Way Volunteer Center can help find a temporary opportunity so your employee can remain active in a way that matches their abilities and restrictions.



[stjosephunitedway.org](http://stjosephunitedway.org)



**Have a question? Need help?  
Want to learn more?**

Contact Kylee Strough at 816.364.2381 or [kylee.strough@stjosephunitedway.org](mailto:kylee.strough@stjosephunitedway.org)

**Thank You**  
**For Being**  
**Part Of The**  
**Caring Power of**  
**Community**