

United Way Employee Campaign Coordinator Handbook



UNITED WAY
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 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 local Partner Agencies who provide programming and services in these areas, and by developing and maintaining local programs and 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 programs and initiatives led by United Way.
- Allocation of dollars raised through the annual fundraising campaign are based on recommendations of more than 140 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 help raise annual campaign funds each year.
- Approximately 24% of the annual funds raised come from businesses giving corporate gifts, 60% from individuals giving through workplace campaigns and the other 16% 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!



#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*

#4

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 United Way to participate in committee meetings.

Becoming An Informed Champion

- ⇒ Learn more about the programs and services provided by United Way's Partner Agencies and United Way initiatives and programs in our Resource Guide available at 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.

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. Contact United Way 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 United Way is aware of your rally schedule so we 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 United Way 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 28 (Pacesetters)	Campaign Kickoff (September 3)
November 2	Campaign Celebration (November 5)

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

Campaign Checklist– Are You Rally Ready?

One week prior to your rally have you:

- ☐ Reserved a meeting space?
- ☐ Notified United Way?
- ☐ 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

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

Do you have employees looking for help?

We encourage you, or your employee, to call United Way at 816.364.2381 or email kylee.strough@stjosephunitedway.org. We will ask a bit about their unique situation and needs and help connect them to resources that may help meet their

Do you have an employee on light duty?

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

The world loves companies that care!

- **71%** of employees say it's imperative or very important to work in a culture that supports giving and volunteering.
- **55%** of employees would choose to work for a socially responsible company, even if it meant a lower salary.
- **72%** of consumers would recommend a brand that supports a good cause over one that doesn't.

Source: America's Charities Snapshot Employee Donor Research, 2016 Cone Communications Employee Engagement Student, Edelman's 2012 goodpurpose study.

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. We can connect your employees to a list of area child care providers. We're continually working to better understand gaps in availability and the barriers your employees face when seeking child care, so we can identify potential solutions.

Are you looking for team-building activities?

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

**Stay Connected &
Informed:
Visit
stjosephunitedway.org or
call 816.364.2381.**

**Thank You For
Being Part of the
Caring Power of
Community!**



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