



United Way Capital Area Workplace Giving Campaign 2011



THANK YOU FOR VOLUNTEERING TO BE AN ECC!

We know that being an Employee Campaign Coordinator (ECC) takes a lot of hard work, dedication, and commitment to improving your community. As an ECC, you already know what it means to LIVE UNITED—you give, advocate and volunteer on behalf of this community. Thank you for your dedication and for helping UWCA address the root causes of poverty in Central Texas: Education, Income & Health.

Your Role as an Employee Campaign Coordinator

As an ECC, you are your company's liaison for the United Way Workplace Giving Campaign. You will play a lead role by educating your co-workers on the importance of giving through the workplace. To help you run a fun, educational, and successful campaign, we encourage you to use this checklist as along with the Campaign in a Box toolkit available at www.unitedwaycapitalarea.org/toolkit.

This checklist will provide you with step-by-step instructions to simplify your planning and maximize your effectiveness.

1. Get Your Ceo Or Senior Management Involved

CEO endorsement and visibility not only increases employee participation, but also sets the stage for increased contributions at every level. As your CEO and senior managers to:

- Pledge a corporate gift on behalf of the organization.
- Designate time for employee campaign meetings.
- Write a letter or send an e-mail to all employees showing his or her support for the United Way campaign.
- Speak at, and actively participate in, campaign events.
- Send a thank you letter to donors and campaign team members at the close of campaign.

Templates for emails from your CEO or other managers are available in the online toolkit.

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2. Recruit A Team And Plan Campaign Strategies

Don't run your campaign alone. Recruit a committee of enthusiastic, resourceful and committed employees to help you plan the best possible campaign.

- Diversity is important. Involve representatives from various departments in your organization such as marketing, human resources, payroll, etc.
- For continuity, implement a rotating ECC and Co-ECC structure.
- Set up regular committee meetings and delegate various responsibilities. You can ensure campaign success by creating roles and responsibilities for committee members, such as marketing and events, campaign communication, department liaison, payroll contact, etc.
- Start brainstorming about campaign themes, events, goals and activities. Think about your company's culture and take this into account when designing events and activities to ensure a well received campaign. For example, would employees get more excited about department competitions or a volunteer project?
- Determine your timeline. The most effective campaigns are short and goal-oriented. Keep your campaign within 1-2 weeks. Set a specific start/end date and inform your co-workers.
- Plan for an exciting campaign kick-off and wrap-up. You want to create an atmosphere of excitement and celebrate a job well done.
- Ensure all shifts and site locations have the opportunity to participate.

Our committee members and committee roles/titles are:

Campaign start:

Campaign end:

All pledge cards are due:

3. Set A Challenging Goal

The best campaigns have measurable goals.

- Be ambitious, yet realistic so that your co-workers have an attainable target to reach.
- Focus on goals beyond just dollars raised. Think about employee gift donations, but also consider employee participation, average gift amount, and 100% staff attendance at volunteer projects/campaign events.

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- Remember to focus on the impact of employees' gifts, not solely the dollar amount. For example, use United Way's online Impact Calculator at www.unitedwaycapitalarea.org/give/impact_calculator.php to illustrate the influence employees' contributions and community investments have in creating positive change.

Our company's goal is:

Employee \$

Other \$

4. Engage And Educate Employees

Motivate employees to get involved in their community. Encourage them to Live United by giving, advocating and volunteering! Brainstorm with your committee on creative ways to educate co-workers about the impact of their donations in the community.

- Rallies: Hold educational meetings and events throughout the campaign to get employees together, have fun, and learn more about the community needs and how they can get involved. Ensure the event offers employees plenty of ways to learn and understand what their contribution to United Way is accomplishing. These meetings can be flexible in their design and utilize United Way Capital Area's Impact Stories (available in the online toolkit) to provide real-life examples of United Way's work.

Our meeting is scheduled for:

We will promote the meeting by leveraging these marketing and communication activities:

We want to be sure the following leadership and management are in attendance:

- Volunteer Projects: Hands On Central Texas, a program of United Way Capital Area, provides group volunteer opportunities that promote team building. Visit www.handsoncentraltexas.org to search and register for available projects.

Our volunteer project is scheduled for:

We are volunteering at

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- **Leadership Meeting:** This meeting is designed to educate upper management and organizational leaders about the benefits of giving at the Leadership level (annually, \$1,000 and more). Please visit the online toolkit for leadership giving strategies and information about United Way's leadership groups.

Our leadership meeting is scheduled for:

- **Educational Special Events:** Hold a LIVE UNITED video contest where employee teams compete by making videos that reflect how they participate in the well being of their community.

Our special event is scheduled for:

Our special event is

5. Communicate And Publicize The Campaign

Campaigns with great visibility engage everyone to take part in them.

- Consider using e-mail, intranet sites, personalized letters, pay stub inserts, and United Way materials to promote the campaign.
- Hang posters and flyers in prominent places like lobbies, kitchens/lounges, and elevators to announce the United Way campaign dates and important information.
- Make sure you have the following essential United Way materials:
 - Brochures
 - Posters
 - Pledge Forms
- Extra materials are located at www.unitedwaycapitalarea.org/toolkit and through your Development Officer.
- Provide incentives to encourage giving. You can purchase United Way incentives at www.unitedwaystore.com.
- Engage with UWCA online: you can find us on Twitter ([@unitedwayca](https://twitter.com/unitedwayca)), Facebook (www.facebook.com/unitedwaycapitalarea) and at our campaign-specific website www.unitedwayroots.org. Please share your story on our site or send us pictures, video and other updates on your campaign.

We plan to market and communicate the campaign in the following ways:

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6. **SAY THANK YOU**

Ensuring your employees have a positive experience is critical to keeping them as happy and consistent donors.

- Thank donors, employees, and your campaign team in a timely fashion after the end of the campaign.
- Thank contributors for participating in the campaign with incentives such as prize drawings, a thank you luncheon, or personal letters.

We plan to say thank you in the following way(s):

7. **WRAP IT UP**

The steps below outline the appropriate measure for closing out your workplace giving campaign.

- Publicize your campaign's end date and ensure all pledge forms are turned in by the deadline.
- Deliver the donations in an envelope to the United Way office. Be sure to include the top copy of pledge forms and all cash and checks from one-time gifts and special events. You must sign the envelope verifying amount of cash and/or checks enclosed.
- Complete the Processing Check List in the online toolbox and include a printed copy in the envelope.
- Final results should be submitted to United Way within two weeks of your campaign's close. This allows United Way to process donations and thank your employees in a timely manner.
- Remind donors to keep their copy of the pledge form for tax purposes.

We will turn in our results to United Way by:

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8. KEEPING EMPLOYEES ENGAGED YEAR-ROUND

Encourage employees to volunteer as a mentor or tutor:

Middle school students with at least one helpful adult in their lives are almost twice as likely to graduate. Spend just one hour a week with a kid, and you'll be amazed at the difference it makes. Find out more at www.1HourForKids.org.

Stay informed with our newsletter:

Encourage employees to sign up for the United Way e-Newsletter at www.unitedwaycapitalarea.org/newsletter.

9. REMEMBER TO HAVE FUN!

The United Way campaign is a great excuse to have a little fun at work.

Visit www.unitedwaycapitalarea.org/toolkit to access the Campaign Toolkit for great tips, tools and resources to make the most of your campaign.



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