

EMPLOYEE CAMPAIGN



MANAGER

TOOL KIT



United Way
Monterey County

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WORDS FROM OUR LEADERSHIP

Dear Employee Campaign Manager,

We know that United Way campaigns at the companies throughout our community don't just happen. They are envisioned, led and accomplished by dedicated people like you – our Employee Campaign Managers (ECMs). And for that we offer you our deepest gratitude and admiration.

The ECM at each company is truly at the heart of making a United Way campaign successful – and successful campaigns mean that thousands of children, teens, adults, and families throughout Monterey County will receive the help they need.

We know that serving as ECM means additional responsibilities for you, and we truly appreciate your willingness to provide that leadership in order to help our community.

We hope the information included in this guide will give you the tools, best practices and guidance you need to make your United Way Campaign as successful as possible.

Our mission is to fight for financial stability of families in Monterey County with a focus on child care, housing and asset building (educating families to be financially self sufficient).

The lack of affordable, quality child care and housing for working families is affecting the health, safety, and educational achievement of our residents. It also limits the productivity of our local businesses. That's why United Way leverages our many relationships to tackle these tough issues facing our community.

Thank you!

Brett Harrell

Board Chair
The Nunes Company

Doug Yount

**Chair Elect & Vice Chair,
Resource Development**
Project Director - Marina
Community Partners

Katy Castagna

President and CEO
United Way
Monterey County

ECM

/ē-sə-em/

noun

Employee Campaign Manager

A person who helps his/her organization work with United Way and leads the organization's annual United Way campaign through planning, implementation, and evaluation.

WHAT DOES AN ECM DO?

- Educates co-workers about United Way and provides opportunities for them to get engaged
- Assembles a committee of ambassadors; your colleagues help you build support for the campaign
- Sets goals to increase giving and volunteering (number of donors, dollars raised)
- Holds a campaign kickoff and coordinates other special events
- Distributes United Way materials and pledge forms to colleagues; prepares and submits completed pledge forms to your United Way liaison

BENEFITS OF BEING AN ECM:

- Showcase your leadership and project management skills at work
- Network with colleagues at your organization and in other industries
- Create positive impact in your community

WHY SUPPORT UNITED WAY MONTEREY COUNTY

United Way Monterey County builds financial stability for working families. We invest on long-term solutions that create lasting change and prevent problems from arising in the first place. When you support United Way Monterey County in your workplace, we promise:

LONG-TERM SOLUTIONS:

United Way is working hard to build financial stability for all people in Monterey County. Nearly 60 % of families with young children do not earn enough to make ends meet without some sort of assistance. The two biggest costs for working families are child care and housing. That's why United Way is increasing quality, affordability and supply of both. This will produce real, lasting change today and for future generations.

LOCAL IMPACT:

The money you raise stays in our community to support crucial services and initiatives throughout Monterey County. A healthy, strong local community results in a robust, prosperous local economy.

POSITIVE RECOGNITION:

When you support UWMC in your workplace, you'll join a network of more than 250 area businesses. Research shows that customers have a strong preference for businesses who "give back."

ORGANIZATIONAL PRIDE:

Whether you engage in a workplace campaign, make a corporate contribution or sponsor an event, your partnership with UWMC provides your team the opportunity to take on leadership roles, engage in team building and grow morale while improving our community.

VOLUNTEER OPPORTUNITIES:

Your employees can deepen their impact by participating in special group projects for team building or individually to gain professional development.

CONVENIENCE & AFFORDABILITY:

Through payroll deduction or other giving options, your employee donors will make a significant impact on their community with minimal effect on their wallets.



Contact: Yessica Ramirez
Yessica.Ramirez@UnitedWayMCCA.org

CAMPAIGN TIMELINE

PRE-CAMPAIGN

1 to 4 Weeks Before Campaign

Attend ECM training

- Host planning meetings with you United Way Development Manager to map out strategy.

Analyze past results and set campaign goals: dollar amount and/or number of participants

- Build campaign team
- Plan Kickoff Rally

CAMPAIGN

Duration: 1 Week to 1 Month

Host a kickoff event with a United Way Development Manager in attendance

- Conduct leadership giving meeting
- Encourage coordinators to talk about campaign and giving options
- Schedule personal asks
- Send emails about activities (reminders about events, last day of campaign giving, volunteer opportunities, etc.)
- Collect pledge forms; if running an e-campaign, encourage completion of e-pledges

POST-CAMPAIGN

Duration: 1 Week

Announce results to company

Thank coordinators and employees with an event, email, or letter

- Debrief with your United Way Development Manager
- Coordinate year-round engagement activities for your employees

CELEBRATE YOUR CAMPAIGN

Attend Live United Awards Celebration in April

Meet
Development
Manager

Educate staff

Volunteer
Event

BEST PRACTICES

Top-Level Support and Corporate Match

Endorsement from your company's CEO is vital to the overall success of your United Way fundraising efforts. A corporate match on employee dollars is a great way to incentivize a donor's pledge.

Conduct A Fun and Educational Campaign

- Don't run your campaign alone – form a committee!
- Use incentives to turn special events donations into payroll deductions/monthly pledges.
- Educate before asking: communicate United Way's work in Monterey County and the needs of our community.
- Promote United Way via social media and internal resources.

Engage Leadership To Strengthen Your Company's Investment

- United Way leadership donors are leaders in their organization, leaders in our community, and leaders in generosity.
- The success of UWMC depends on the community working together to change people's lives and create lasting results. Leadership donors build the foundation of that success. Promote United Way via social media and internal resources.

Goal-Setting Worksheet

Set a challenging, yet attainable goal. Be ambitious but realistic so your co-workers have an attainable goal to reach.

<u>PREVIOUS YEAR</u> TOTALS	<u>CURRENT YEAR</u> GOALS
<u>EMPLOYEE CONTRIBUTION, SPECIAL EVENTS</u>	EMPLOYEE CONTRIBUTION + SPECIAL EVENTS = \$ _____
<u>CORPORATE GIFT</u>	CORPORATE MATCH/GIFT = \$ _____
<u>% PARTICIPATION</u>	NEW DONORS X \$ _____ = \$ _____

Total \$ _____ **% Increase** _____

STRATEGIES FOR SUCCESS

HOW TO ASK FOR A PLEDGE

Get Donors' Undivided Attention

- Start the discussion on a positive, friendly note
- Explain the purpose
- Find out what they know about United Way

Explain United Way and Why You Support Us

- Bring UWMC materials and be prepared to explain them. Provide flyers to each person or use a front-of-the-room presentation
- Share a personal story, success story or United Way facts

Ask For The Pledge

- With new donors, ask for a first-time gift and offer an incentive for giving
- For annual donors, encourage or incentivize them to increase their gift
- Consider asking for a specific increase, such as \$1 more a week or pay period or a 10% increase
- Remember, you are not asking for yourself; you are asking on behalf of someone who needs help
- Offer incentives for turning in a pledge form or submitting an ePledge

Answer Questions and Handle Concerns

- Know your materials and answer questions honestly
- If you don't know the answer to a question, let the donor know you will find out and then follow up with your Development Manager
- Recognize that some donors have real concerns; people have a right to feel good about their gift

Say "Thank You"

- Regardless of what the donor decides, thank them for their time
- People like to know their gift is appreciated

SET UP A CAMPAIGN MEETING

SAMPLE AGENDA

Item	Presenter	Duration
Opening remarks	ECM	2 minutes
United Way Overview	DM	5 minutes
The Ask	DM	2 minutes
Closing Remarks	ECM	1 minute

Most Importantly - Say Thank You!

Campaign Theme Ideas

- Broadway/Hollywood
- Pirates/cowboys
- Sports/local teams
- Hawaiian/beach
- Superheroes
- James Bond
- Decades/History
- Carnival Mardi Gras
- Olympics

Incentive Ideas

- PTO - hour, half day, full day
- Coupons or gift certificates
- Movie or sport tickets
- Prime parking spaces
- Dress down days
- Sleep-in-late or leave-early days
- Mugs, t-shirts, water bottles, etc.
- Lunch or dinner with CEO

CAMPAIGN TOOLS

United Way provides a variety of print materials for you to use in building a campaign that will be most effective for your company.

UNITED WAY WILL PROVIDE:

Campaign Overview

Gives a brief overview of what United Way does and what impact your gift to United Way can make in our community.

United Way 2-1-1 Cards

Business cards that give brief information about the services provided by United Way 2-1-1, our free 24-hour call center for those seeking community resources.

What Your Dollar Buys

Gives specific examples of what an individual gift provides and the improvements that our combined investment in United Way have made possible in our community.

Our Work Brochure

Provides an overview of how United Way invests in programs in our community that promote financial stability for all.

Pledge Forms

Paper versions of our pledge form are available for all campaigns.

Be sure you make a copy of each pledge form before you turn the originals in to United Way

Emerging Leaders Society Insert

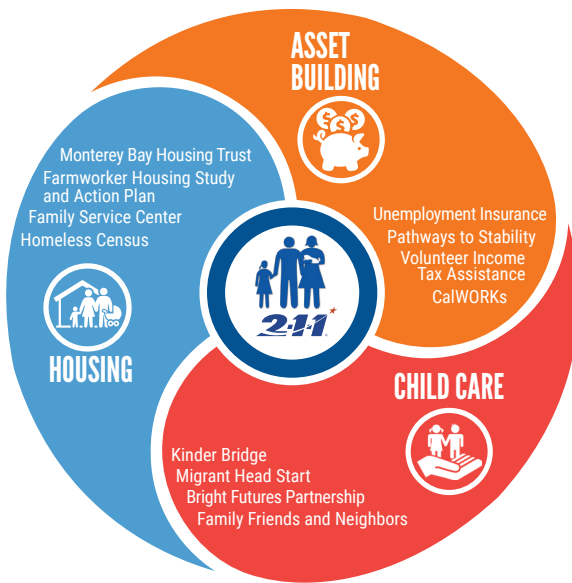
United Way's Emerging Leaders Society (ELS) is a new generation of leaders committed to BIG and LASTING CHANGE in our community.

KEY MESSAGING/FAQS

ELEVATOR SPEECH

Our mission is to fight for financial stability of families in Monterey County with a focus on child care, housing and asset building (educating families to be financially self sufficient).

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OUR IMPACT AREAS

Child Care

Healthy, thriving young children ready for school success

Housing

Affordable, quality housing for working families

Financial Stability

Connecting adults and families with tools and support to thrive

UNITED WAY 2-1-1

United Way also provides a free, confidential call center and a comprehensive online database to connect those in need with the community resources that can help them. United Way 2-1-1 call specialists are available 24 hours a day, 365 days a year.

WHERE DOES MY MONEY GO?

All funds donated to United Way Monterey County stay here to help those within our own community.

United Way provides funding for major initiatives we lead in collaboration with community partners, as well as providing funding for various programs.

WHAT A DOLLAR BUYS



When you give to United Way, you make a difference. Your investment improves lives today and helps create lasting change. Can we count on your **bi-weekly** gift?

Your Choices Make a Difference



**A \$5
CUP OF
COFFEE**

OR

10 people
can access the help
they need 24/7
through 2-1-1.



**A \$10
LUNCH
OUT**

OR

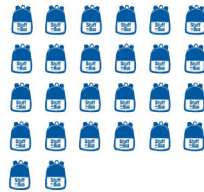
8 working families
making an average of
\$23,100 can claim all
eligible tax credits and
**get their biggest
paycheck of the year.**



**A \$20
PAIR OF
MOVIE
TICKETS**

OR

26 students
who are homeless get
**backpack filled
with supplies**
so they can succeed
in class.



**A \$50
DINNER**

OR

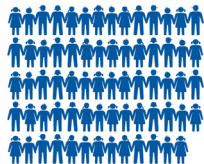
11 children attend
**a week of quality
preschool to prepare**
for success in Kindergarten
and beyond.



**A \$100
NIGHT ON
THE TOWN**

OR

69 students
who are homeless
and their families have
**a safe, clean place to
shower, do laundry**
and pick up basic supplies.



CLOSING THE CAMPAIGN

HANDLING PAPER PLEDGE FORMS DURING CAMPAIGN

- At the close of the campaign, follow up with your staff to make sure no one has forgotten to submit their pledge form to you
- **The following information is required in order for the pledge form to be processed:**
 - » Name
 - » Address
 - » Employer
 - » Total Annual Gift
- Submit white copy to your HR or payroll team for filing
- Fill in the information on the front of the envelope to the best of your ability
 - » Place pledge forms, along with cash or checks collected, into the Campaign Envelope provided by United Way
 - » Remember to include documentation supporting any corporate gifts include in your campaign total (corporate pledge form, email/ letter confirming your organization's intent to make a corporate gift; please make sure document includes dollar amount)
 - » Don't forget to include any special event money raised as well
- Reach out to your United Way contact to pick up envelope
- Thank your staff!

TIPS FOR YEAR-ROUND ENGAGEMENT

United Way's three core actions are: Give. Advocate. Volunteer. Upon completing the end-of-year giving campaign, the rest of the year your relationship to United Way should focus on advocacy and volunteering.

ADVOCATE

Social Media

- Stay up to date on United Way's work by following us on Facebook, Twitter, Instagram, and LinkedIn
- Participate in social media campaigns around United Way's community focus on Child Care, Housing, and Financial Stability

Our Public Policy Platform

- United Way works in collaboration with volunteers, community partners, and health and human service advocates to support these policy positions and principles at the local, regional, and state levels

VOLUNTEER

United Way Is Your Home for Connections to Volunteer Opportunities All Across the Community

Check out United Way's Volunteer Center page to find opportunities!

United Way Volunteer Experiences

Year-round United Way engagement opportunities.

Skilled Volunteering

Opportunities abound for skilled volunteering. Please reach out to your United Way contact for more information.

Meaningful community solutions require more than money or programs or policies. The kind of real and lasting change that benefits everyone is only possible when people from all walks of life are willing to roll up their sleeves and go where their time and talent is most needed.

Please visit www.unitedwaymcca.org to find an up-to-date list of volunteer opportunists around Monterey County.

