

# The ECM Toolkit



You **LIVE UNITED** when you  
**GIVE, ADVOCATE** and **VOLUNTEER**  
to strengthen our community.

## **GIVE**

what you can  
to give people a chance  
at independence.

## **ADVOCATE**

by staying informed.  
Inform others.  
Speak out and be heard.

## **VOLUNTEER**

an hour. An afternoon  
Give a part of yourself  
to make change.

As an Employee Campaign manager, you do all three — THANK YOU!

As an Employee Campaign Manager (ECM), you are the critical link between United Way and the people you work with every day. You are helping us make our community stronger. This guide contains useful information that will help you run a campaign that will maximize the potential of your company and enable you to answer questions others may have about United Way.

Remember, you are not in this alone. A representative of the United Way will be available as you kick off your campaign and along the way to ensure successful results.

At United Way, we are about making Caldwell County a place where all individuals and families thrive. We know that it takes all of us working together to make that happen. Thank you for taking on this important role. Here's to you and your partnership with United Way of Caldwell County.

# UNITED

# WE CAN!!

# Your role as an Employee Campaign Manager

As an Employee Campaign Manager (ECM), you are the liaison between your company and United Way, and you will lead the planning, implementation and evaluation of your organization's annual United Way campaign.

## TRAINING

Because you will be asking others to give, it is important that you understand United Way of Caldwell County's work in the community, and are able to communicate the benefits of giving, based on personal experience. ECM training will give you the tools you need and stories to share for a successful campaign.

## ONGOING SUPPORT

Your United Way Representative will guide and assist you with all your campaign needs and keep you informed about community issues and successes throughout the year.

## WHAT DOES AN ECM DO?

- Work closely with your United Way Representative to create a campaign strategy including:
  - Visible support from top management
  - Goals to increase giving (participation and monetary goals)
  - Corporate gift
  - Leadership giving (gifts of \$500 or more)
  - Employee education about United Way of Caldwell County
  - The opportunity for each employee to give
  - Motivation and encouragement so your colleagues get involved and make a contribution
- Assemble a campaign committee of ambassadors that represents all levels of your organization
- Hold a campaign kickoff/rally
- Distribute United Way materials and pledge forms to colleagues
- Prepare and submit completed pledge forms to your United Way representative
- Evaluate your campaign and make recommendations for next year

**TIP:** Provide training for your entire committee before kickoff. Successful asks require knowledgeable ambassadors who are comfortable asking for a pledge.

## BENEFITS TO YOU AS ECM

- Showcase your leadership and project management skills
- Network with colleagues at various levels of your organization
- Receive communication from United Way keeping you up-to-date on the latest news in our community
- Personally take an active role to create impact in Caldwell County

# Campaign goals and timeline

## **DETERMINE YOUR CAMPAIGN GOALS**

The best campaigns have measurable goals. Your United Way representative will give you your company's past campaign information to help you create goals.

Examples of goals:

- Increase participation (the number of employees giving)
- Increase the number of leadership circle (donors who give \$500 or more)
- Increase overall employee giving (the total amount raised by employees)
- 100 percent education (every employee learns about United Way and how, together, we are making an impact in our community)

## **ESTABLISH DATES AND TIMELINES OF CAMPAIGN ACTIVITIES.**

The best campaigns are brief and goal-oriented.

## **TIMELINE OF A TYPICAL CAMPAIGN**

### **Pre-campaign (2 weeks – 1 month)**

1. Hold planning meetings with...
  - a. Your United Way representative
    - Review past results and develop a strategy
  - b. Your CEO or senior management – As ECM, your most important step is to work with your CEO to establish a top-level team and enlist their personal support in the campaign. Support from the top demonstrates your company's firm commitment to the campaign and to changing lives.
    - Set campaign dates (the United Way of Caldwell County will set your campaign dates)
    - Secure a letter of endorsement
    - Obtain the corporate gift commitment
    - Set dollar and/or participation goals
    - Create a plan for leadership circle
2. Recruit ambassadors and committee members
  - Select individuals from different areas and levels so that you can reach everyone during the campaign
3. Send a letter to employees from your CEO or senior management endorsing the campaign and inviting them to participate
4. Schedule meetings to educate employees
  - Publicize the meetings; make them fun and educational

### **Campaign time**

1. Hold a fun kickoff event
  2. Keep your United Way representative informed and involved regarding the campaign status
  3. Hold a leadership giving event
  4. Have ambassadors follow up with individuals or small groups
  5. Use e-mail, voicemail, posters, etc., to distribute United Way information
  6. Collect pledge forms and prepare them for your United Way representative
- Make sure your payroll department retains the employer copy to ensure payroll deductions

### **Post-campaign**

1. Announce the close of your campaign and your campaign results
2. Thank employees with a victory celebration, e-mail or letter
3. Plan for year-round engagement



# United Way Talking Points

**United Way is the leader in addressing our region's most critical issues.** Large-scale problems, such as homelessness, access to affordable health care, high-school dropout rates or families in financial crisis, cannot be solved by a single organization. These challenges require a coordinated effort of the entire community. This is where United Way provides the leadership to make lasting change. Only by working together can families thrive.

**We need you.** It takes the entire community to make a difference. No one shelter, meal program or child care center can solve the challenges we face. But each one of us can do something to change our world. It takes all of us working together to tackle today's toughest issues and make our community stronger. Please join United Way today.

**Please give.** Your gift to United Way, combined with that of your neighbors, will help us achieve lasting change. The money you donate today will ensure families are thriving tomorrow.

**We are conscientious stewards of community resources.** All of our community resources are precious and necessary. We carefully research, think and plan in order to strategically use all of the community resources possible — money, volunteer time and expertise, and in-kind donations — to get the results our community needs. We spend your gifts wisely.

# Low-budget ideas for getting employees involved

Low-budget ideas are a way to provide a fun supplement to your company's United Way campaign. Use any of the ideas listed below, or if you have a fun idea of your own, talk to your United Way representative about implementing it in your company.

## FUN EVENTS

Casual day, executive dunk tank, online auction, company picnic/employee cookout, ice cream social, pizza party, pancake breakfast, office Olympics, campaign slogan/theme contest, cubicle decorating contest, departmental penny wars, softball/volleyball tournament, premiere parking space auction, beach party, carnival, voicemail/e-mail quiz, United Way trivia contest, male beauty contest, chili cook-off, ugly tie/ugly earring contest, funniest home videos, dress-up day, baby picture contest

## THEMES

'60s, '70s and '80s, back-to-school, beach party, carnival games (putt-putt, golf, pool table, ring toss, etc.), Mardi Gras, movies (Charlie's Angels, Men in Black, Mission Impossible), mystery, Olympics, scavenger hunt, Hawaiian luau, reality show, superheroes, Oscars/red carpet party, black and white party, go international, casino night, Be a winner...Give to United Way, Be a part of a winning team...Give to United Way, Make our community a winner...Give to United Way, Working together we make a winning team, Help United Way win our community

## EDUCATION

- Hold campaign training at a United Way partner agency
- Hold nonprofit tours
- Create/decorate bulletin boards within/around the office
- Provide United Way fact-filled screen savers
- Give employee testimonials – at United Way meetings, via mass e-mail, broadcast voicemail, and video
- Send United Way fact-of-the-day e-mails
- Conduct United Way trivia contests online or in meetings
- Invite United Way partner agencies to you – hold a fair in a high-traffic area in your building

## INCENTIVES

Early dismissal for increasing pledge to a specified level, executive team walks the floor and personally thanks employees, campaign committee walks the floor and says thank you (gives out candy bars, ice cream sandwiches, etc.), time off from work, casual day, tickets to games/movies, gift/grocery certificates, company t-shirts, sleep-in passes, leave-work-early passes, trophy for department with highest participation, hot chocolate and whipped cream party on a cold day, purchase small thank-you tokens from United Way store, executives serve lunch to employees

### **SPECIAL EVENT FUND RAISERS**

Sundaes on Mondays, American Idol talent show, silent auction, live auction, bake sale auction, Coney Island-style cookout, employee craft show, drawing for prizes, shoe shining by executives, garage sale (office clutter, surplus supplies, old computers, etc.), executive sumo wrestling match, movie day (charge admission and serve popcorn), hat day, Halloween parade, in-house telethon to call for employee pledges, ugly hat day or ugly sport coat contest, jail-a-thon (employees are arrested and jailed in a public place and co-workers have to bail them out), bowl-a-thon, walk-a-thon, dance-a-thon, bike race, tailgate party

### **PRIZES**

Drawing for \$500 contributors to receive dinner with CEO at his/her home, auction with prizes donated by members of the executive team, services donated by employees (pet sitting, car wash, etc.), breakfast or lunch with the CEO and three friends, free lunch in company cafeteria, an extra day off for a 10 percent pledge increase, golf with the CEO, free parking or use of executive parking spaces, drawing for first-time donors, prizes for turning pledge cards in early, lunch or breakfast with executive team, cookout at an executive's home

### **LEADERSHIP GIVING EVENT IDEAS**

Breakfast or lunch at a United Way agency with tour, breakfast and United Way speaker at office; rush hour wine tasting - with donated wine and cheese; golf, tennis or racquetball with CEO; serve an assortment of gourmet desserts at your United Way meeting; do a children's arts and crafts project with United Way agency beneficiaries to produce gifts for leadership givers

### **THRIFTY IDEAS**

Candy jar guess, popcorn sale, plant and flower sale, bake sale, drawing for free trip using company's frequent flyer miles, book fair, car wash

# 10 Campaign best practices: Check points for your campaign

- OBTAIN CEO AND SENIOR LEADERSHIP INVOLVEMENT**
  - Ask company leadership for consistent and visible management support of the campaign. These leaders should speak at major campaign events, including kick-off celebrations, leadership events and the closing of the campaign.
- CORPORATE GIFT**
  - Coordinate with company leadership to establish a company match of employee contributions.
- AMBASSADORS**
  - Recruit a strong, diverse campaign team with representatives throughout your organization.
  - Train the team through ambassador training
- CLEAR GOALS**
  - Looking at last year's totals, set clear goals with dollar and participation increases.
- UNITED WAY OF CALDWELL COUNTY TRAINING AND RESOURCES**
  - Meet with your United Way contact to plan and customize your campaign.
- LEADERSHIP EVENTS (Executives Club: \$500-\$999, President's Club: \$1000-\$2499. Chairman's Club \$2500-\$5000, Alexis De Tocqueville Society \$10,000 +)**
  - Utilize leadership giving to substantially grow your campaign.
  - Plan a smaller, more targeted event for current and prospective leadership givers.
- STRONG EDUCATIONAL CAMPAIGN**
  - Connect people with the issues that are most important to them.
  - Conduct fun, educational rallies and events to educate people on the programs United Way supports.
- VOLUNTEER ACTIVITIES**
  - Empower others to feel a part of the larger community and part of the solution to issues in our community through volunteer activities.
- THE ASK**
  - Ask everyone to contribute and make sure everyone has an opportunity to give.
  - Eliminate the number one reason people do not give — no one ever asked.
- SAY THANKS**
  - Schedule a celebration event as a way to say thank you to donors and campaign assistants.
  - Include a thank you message in your company newsletter or on your intranet.

Your United Way contacts are here to help you throughout the campaign. Please do not hesitate to utilize them as a resource for your campaign.