



## Employee Campaign Manager



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# ECM

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## noun

**Employee Campaign Manager** • A person who helps his/her organization work with United Way throughout the year 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

## YOUR TEAM AT UW

**Workplace Giving Manager** | United Way staff member who assists ECMs with campaign efforts, including year-round activities.

**Loaned Executive or Campaign Associate** | Staff member from a United Way corporate partner who volunteers during campaign season and helps the Workplace Giving Manager.

**Gift Processing** | United Way team that processes pledges made during campaign.

**ePledge and eWay Coordinator** | (if applicable) United Way team that builds and supports digital platforms for giving.



Being an Employee Campaign Manager has given me the opportunity to connect our employees to the Kansas City Community! Finding what they are passionate about and connecting them to the organizations that make our city so great is what makes it so worthwhile! Kansas City is such a giving community and we are proud to be a part of that!

LAURA READ

ECM | BLUE CROSS AND BLUE SHIELD OF KANSAS CITY

Working with United Way has given me a better appreciation for what United Way does for the whole of our community. Such great, local programs make it easy to help our employees find a connection that makes their giving meaningful.

AMANDA HEMBREE

ECM | SULLIVAN HIGDON & SINK





# CAMPAIGN TIMELINE

## PRE-CAMPAIGN

### 4 to 6 weeks before campaign kickoff

#### Review ECM digital training

- Host planning meetings with your United Way Relationship Manager to map out campaign strategy

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

- Build campaign team
- Plan Kickoff Rally
- Strive for Circle of Caring Award

## CAMPAIGN

### Duration: 1 week to 1 month

#### Host a kickoff event with a United Way Workplace Giving Manager in attendance

- Conduct leadership giving meeting
- Encourage ambassadors 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 and share the community impact

#### Thank ambassadors and employees with an event, email or letter

- Debrief with your United Way Relationship Manager
- Coordinate year-round engagement activities for your employees
  - Volunteer Activities
  - Leadership events
  - LINC engagement activities

## CELEBRATE YOUR CAMPAIGN

Invite your United Way Relationship Manager to come back and thank donors for their generosity. Acknowledge new donors, long time donors, or leadership donors.

# 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 Greater Kansas City 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 UWGKC depends on the community working together to change people's lives and create lasting results. Leadership donors build the foundation of that success.

## GOAL-SETTING WORKSHEET

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

### PREVIOUS YEAR'S TOTAL

.....  
EMPLOYEE CONTRIBUTION, SPECIAL EVENTS

.....  
CORPORATE GIFT

.....  
# LEADERS

.....  
% PARTICIPATION

### THIS YEAR'S GOAL

EMPLOYEE CONTRIBUTION + SPECIAL EVENTS = \$ .....

CORPORATE MATCH/GIFT = \$ .....

NEW LEADERS X \$1,200 = \$ .....

NEW DONORS X \$ .....  
AVG. GIFT

TOTAL \$ ..... % INCREASE .....

## REVIEW AND WRAP-UP

- **Thank all your donors**
- Provide copies or scans of your pledge forms to your payroll department
- Meet with United Way staff member to review the campaign report envelope if using paper pledge forms or for special event donations
- Inform your leadership team of campaign results
- Year-round activities with your Workplace Giving Manager, e.g. donation drives and volunteer events that match your company's focus area

# STRATEGIES FOR A SUCCESSFUL ASK

## 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

### SHARE WHY YOU CHOOSE UNITED WAY

- Bring UWGKC 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 – never guess
- If you don't know the answer to a question, let the donor know you will find out and then follow up with your Relationship 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



# SETTING A UW MEETING

## SAMPLE AGENDA

ITEM	PRESENTER	DURATION
Opening remarks	ECM	2 minutes
CEO Endorsement	CEO	1 to 5 minutes
United Way Overview	Relationship Manager	5 minutes
Partner Program Story	Agency Speaker	5 min
The Ask	ECM or CEO	2 minutes
Closing Remarks with details of activities and incentives	ECM	1 minute

**MOST IMPORTANTLY – SAY THANK YOU!**

## CAMPAIGN THEME IDEAS

- Broadway/Hollywood/movies
- Pirates/cowboys
- Sports/local teams
- Hawaiian/beach
- Superheros
- James Bond
- Decades/History
- Carnival/Mardis Gras
- Olympics

## INCENTIVE IDEAS

- PTO – hour, half day, full day
- Coupons or gift certificates
- Movie or sports tickets
- Prime parking spaces
- Dress down days
- Sleep-in-late or leave-work-early days
- Mugs, T-shirts, key chains, etc.
- Lunch or dinner with CEO

## FUN, SPECIAL EVENT IDEAS

- Spelling Bee (Managers are asked to spell challenging words that other departments pay to submit.)
- Get out of jail/monopoly

# CAMPAIGN RESOURCES

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

Here are the items you can choose from:

## PRINT

You may order quantities of any of these materials that United Way will print and deliver to you, or we can provide you with the artwork for your company to print internally.

### **CAMPAIGN OVERVIEW PRESENTATION DECK**

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

### **LEADERSHIP BROCHURE**

This booklet outlines the benefits of our Donor Networks and leadership societies available to our donors. Our Donor Networks include something for everything, from young professionals donating \$250 annually all the way up to \$10,000+ Tocqueville Society donors.

### **WHAT YOUR GIFT PROVIDES FLYER**

Two-sided letter-sized flyer 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.

### **INCENTIVES FLYER**

Letter-sized page that outlines United Way's Caring Club (open to those who donate \$250 or more) and other incentives that United Way offers for donors at varying levels.

### **GIVING FORMS**

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

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

### **CIRCLE OF CARING FLYER**

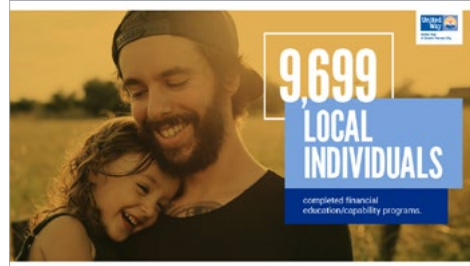
Letter-sized page that promotes the benefits of becoming a Circle of Caring member.

### **POSTERS**

Examples of your impact on our community to be displayed around your work spaces.

### **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.



## DIGITAL

All print materials can be viewed and downloaded as PDFs at <http://www.unitedwaykc.org/creating-an-impact/campaign-tools/>

### EMAIL TEMPLATE

An Outlook email template designed with campaign graphics is available for your internal emails.

**SAMPLE MESSAGING** and art for screens (intranet, screen savers, other internal screens)

**SAMPLE COPY AND ART** for social media use, including a badge/filter that employees can use on their personal social media pages to indicate they have donated to United Way.

**USE HASHTAG #UNITEDWAYKC** for all of your United Way-related social media posts and tag/mention us @unitedwaykc

## VIDEO

View this year's campaign video online:

**United Way website:** [www.unitedwaykc.org](http://www.unitedwaykc.org)

**YouTube:** <https://youtu.be/1D4QhcvkFd8>

# KEY MESSAGING/FAQs

## ELEVATOR SPEECH

Each year with your help, United Way of Greater Kansas City works to create the best version possible of our community. We stand alongside our donors and our volunteers as the leaders capable of understanding the community’s unique needs and then addressing them in ways that create real change. We do it by connecting children, teens, adults and families with the tools and support they need to thrive.

### HERE FOR HEALTH

- Healthcare
- Mental Health Advocacy
- Counseling Services

- Medical Care
- Child Abuse Advocacy, Intervention, and Treatment

- Domestic and Sexual Violence
- Shelter Services



### HERE FOR EDUCATION

- School Readiness
- Youth Development

- Career Pathways for School Age Youth
- Early Learning

- Before and After School Programs



### HERE FOR FINANCIAL STABILITY

- Fighting to eliminate generational poverty

- Safe, Stable and Affordable Housing
- Emergency Assistance

- Case Management
- Income and Asset Development
- Adult Education



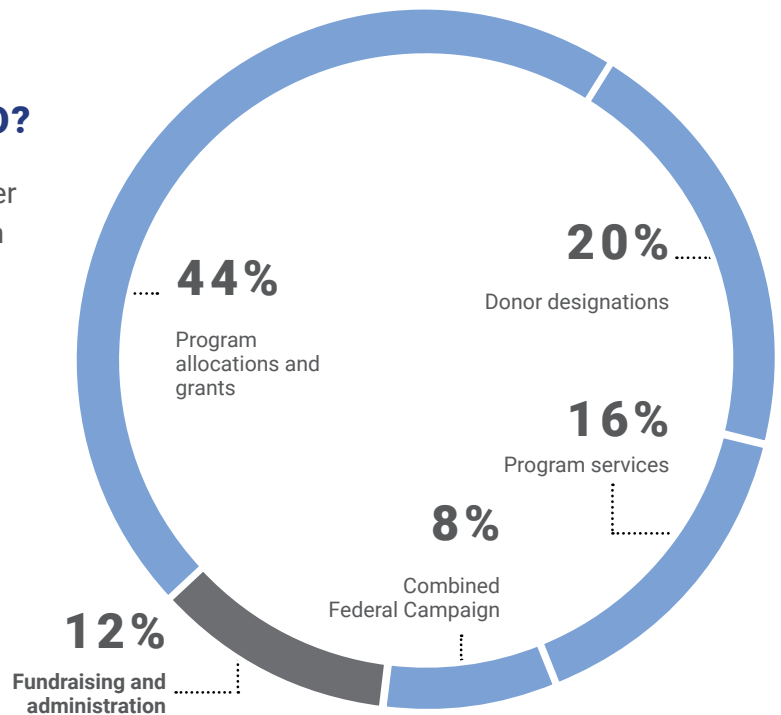
## UNITED WAY 2-1-1

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 of Greater Kansas City 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 196 programs at 139 partner nonprofit agencies.



<http://www.unitedwaygkc.org/find-support/funded-programs>

## ADMINISTRATIVE COSTS

United Way of Greater Kansas City's administrative costs are 12 percent, with 88 cents of every dollar donated going directly to providing services. This is one of the lowest percentages of administrative costs among all nonprofits in Greater Kansas City.

The Better Business Bureau recommends that all nonprofit organizations should have administrative costs of 25 percent or less.

More details about United Way's financials can be found on our website at

<http://www.unitedwaygkc.org/about/financials/>

# CLOSING OUT 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
- Make copies of finished pledge forms and submit to your HR or payroll team for filing
- Fill in the information on the front of the campaign envelope, provided by United Way, to the best of your ability
  - » Place pledge forms, along with any cash or checks collected, into the Campaign Envelope provided by United Way
  - » Remember to include documentation supporting any corporate gifts included 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 the envelope
- Thank your donors!

## RUNNING EPLEDGE OR EWAY DIGITAL-GIVING PLATFORM

- Upon closing the digital pledging portal, United Way will send you a final report containing all giving information
- United Way will send you a payroll deduction file containing all payroll pledges; *Please provide contact information for your payroll department if you would like information sent directly to them.*
- Submit payroll deductions to your HR or payroll team for filing

# TIPS FOR YEAR-ROUND ENGAGEMENT

United Way's three core actions are: **GIVE. ADVOCATE. VOLUNTEER.**

Upon completing the end-of-year giving campaign, you can continue your relationship with United Way through advocacy and volunteering!

## ADVOCATE

### Social Media

- Stay up to date on United Way's work by following us on Facebook, Twitter, Instagram and Snapchat; @unitedwaygkc
- Participate in social media campaigns around United Way's community focus on Health, Education, 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.
- To read our public policy agenda, <http://www.unitedwaygkc.org/create-impact/advocate>

## VOLUNTEER

Year-round United Way engagement opportunities including Team Smile, Poverty Simulation, Mad City Money, VITA (Volunteer Income Tax Assistance) and Impact Kits. They make a real difference in our community and can be great team activities.

Please visit <http://www.unitedwaygkc.org/get-involved/volunteer> to find an up-to-date list of volunteer opportunities around the KC metro area. For questions or additional information on volunteering please contact the Manager of Volunteer Engagement at [camila.alvarez@uwgkc.org](mailto:camila.alvarez@uwgkc.org) or 816-559-4769.

## UNITED WAY RESOURCES AVAILABLE

My Free Taxes; <http://www.unitedwaygkc.org/free-tax-preparation>

United Way 2-1-1; <http://uwgkc.bowmansystems.com/>

## LOANED CAMPAIGN ASSOCIATE

Have your company consider sponsoring a CA or loaning an associate to United Way for the campaign season to gain new skills!



**United Way  
of Greater Kansas City**

801 W. 47th Street, Suite 500 • Kansas City, MO 64112

[www.unitedwaygkc.org](http://www.unitedwaygkc.org)



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