WE ARE UNITED



Employee Campaign Manager Guide A Guide to Having Fun and Raising Money During Your Workplace Campaign

United Way of Siouxland



Welcome to United Way

You are essential to the success of United Way of Siouxland. Without you, we could not provide the funds necessary to	Table of Contents	
support our community. You will engage co-workers in building a stronger community by planning, organizing, and coordinating a successful United Way campaign.	Welcome to United Way	page 3
Are you a first time Employee Campaign Manager? Or are	Who We Are	page 4
you a seasoned veteran? Wherever you are on your Employee Campaign Manager journey, this guide will help you conduct a successful campaign from start to finish. If you have any questions or concerns, please contact United Way	United Way Lingo	page 5
staff and volunteers. We are here to help you! As a United Way Employee Campaign Manager, you will:	Managing Your Workplace Campaign	page 6
 Work closely with your organization's leadership Develop an effective campaign plan Recruit volunteers to assist you Hold campaign kickoff and recognition events 	8 Steps for a Successful Workplace Campaign	page 7
 Promote the campaign throughout your organization Encourage leadership giving in your campaign Thank your donors and volunteers 	Strategies	page 8
Have Fun!	The Nuts and Bolts	page 8
We are here to support you and look forward to a great year.		
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701 Steuben Street Sioux City, IA 51101 712-255-3551 unitedwaysiouxland.com

Who We Are...

OUR MISSION: TO UNITE THE CARING POWER OF OUR COMMUNITY.

OUR CREDO: WE FIGHT FOR THE HEALTH, EDUCATION, AND FINANCIAL STABILITY OF EVERY PERSON IN OUR COMMUNITY.

2020 CAMPAIGN THEME: We Are United.

United Way is about bringing people together to tackle our community's most critical issues because no one person or organization can do it alone. Our Agenda for Change outlines the specific outcomes associated with each of our three focus areas.



COMMUNITY OUTCOMES

Children are born healthy and develop on track Individuals of all ages will increase coping and life skills to achieve mental wellness Youth and adults live a healthy lifestyle Youth and adults live in and maintain a safe/healthy environment

SPECIAL FOCUS

Healthy lifestyles Reduce bullying and violence Healthy developmental growth of children through parenting

EDUCATION

COMMUNITY OUTCOMES

Children enter kindergarten ready to succeed Children are socially and emotionally prepared to succeed in school Children are on track academically and prepared to succeed in school

SPECIAL FOCUS

Kindergarten readiness Grade appropriate reading levels Graduation rates

FINANCIAL STABILITY

COMMUNITY OUTCOME

People have access to resources in crisis to stabilize their situation People have resources and skills to build financial stability

SPECIAL FOCUS

Emergency services Basic human needs Access to resources that build financial stability Increase income potential



United Way Lingo for Your Workplace Campaign

Every organization has their own set of unique terms they use. United Way is no different. Here are some commonly used terms and their meanings.

ECM	Employee Campaign Manager—That's you!
Pledge Envelope	The manila colored envelope you put all your pledge forms and money in for United Way. Make sure it is added up correctly.
Pledge Form	The paper form employees complete regarding their pledge to United Way. Don't forget to give a copy of pledge forms to your payroll department.
ePledge	A web based electronic method of completing pledges.
Company Profile	This sheet details your organization's giving history for the last five years including Employee Giving, Company Giving, Special Events, Number of Donors, and % of Employee Participation.
Donor	Anyone who gives to support United Way.
Giving Card	This is given to anyone who donates \$100+ to United Way and is good for discounts at 40+ local businesses.
Campaign Packet	The materials to support your campaign. Pledge Forms, ECM How To Guide, sample Giving Card, Company Profile Sheet and more.
Incentives	Prizes, gift cards, time off, "Come in an hour late" certificates, movie passes, organization merchandise, anything used to thank employees for giving.
Early Bird Deadline	All organizations that have their campaign completed and their pledge envelope turned in to United Way by November 4, 2020 will have their name listed in an advertisement in the Sioux City Journal the Sunday after Thanksgiving.
Loaned Executive or LE	A trained volunteer that is "loaned" to United Way by a local business to help during the annual campaign.
Roll Over Campaign	A Rollover Campaign takes your employee giving (payroll deductions and billing) from the 2019-2020 annual campaign and automatically rolls it over to the 2020-2021 campaign including gift amount, type of pledge and any designations, unless any changes are specified by the employee.
Recognition	 Alexis de Tocqueville is a nationally recognized program for donors giving \$10,000 per year or more to their local United Way A.S. Garretson Society is a locally recognized group of United Way donors giving \$1,000 or more annually Caring Society are donors who gives \$500-\$999 annually to United Way Young Leaders are donors under age 40 who give \$250 or more annually to the campaign Corporate Champions are corporate sponsors who underwrite United Way's administrative costs Loyal Contributor is anyone who donates to United Way for ten years + Legacy Society are donors who pledge to support United Way through gifts left in their will Women United is a group of women who provide grants focused on children

Managing Your Workplace Campaign

Your help is essential. We unite the caring power of our community to solve the most pressing issues that face Siouxland. We come together to make sure our children succeed in school, our neighbors can be financially independent, and that everyone has the basic necessities of life like food, clothing and shelter. With the help of hundreds of Employee Campaign Managers like you, we're uniting our community toward a common goal.



Whether you represent a small business, a major corporation or a

nonprofit agency, you join 400+ local businesses and organizations showing their commitment to our community by running United Way workplace campaigns. Participating in a United Way campaign will give your organization the opportunity to learn first hand about the needs in Siouxland and to experience rewarding team-building experiences.



Each organization's campaign is unique to their environment. Given the changes we have seen in our world, this year campaigns may look different than in years past, but it's more important than ever. Here are some basic guidelines to help you manage your workplace campaign. Above all, remember United Way of Siouxland staff and volunteers are here to support you.

WHAT IS A WORKPLACE CAMPAIGN?

The workplace campaign is crucial to supporting United Way. During your company's campaign, employees make their annual pledge and participate in events to raise funds that support our work in the community. Workplace campaigns should be:

FUN

We encourage you to set up events to promote the campaign and bring employees together. We all need fun in our lives from time to time and this is the perfect time to do that.

EDUCATIONAL

Raising awareness of what United Way of Siouxland does is a key element in your campaign. If people know and understand why they are giving they are more likely to give.

ENGAGING

Running a workplace campaign not only benefits the community, but it can also improve workplace morale and employee engagement.

Your effort and dedication to our work is appreciated more than you know. when possible, we encourage you to set up a campaign committee to divide responsibilities.







8 Steps for a Successful Workplace Campaign

We invite you to incorporate as many of these best practices as possible in your workplace campaign. Follow these "Eight Steps for a Successful Workplace Campaign" and you have a greater chance of achieving your campaign goals.

1. CEO Support and Involvement

- $\sqrt{-Visibly}$ and actively support the campaign
- √ Commit to holding employee meetings
- $\sqrt{}$ Make a personal contribution
- $\sqrt{}$ Make a gift on behalf of the company

2. Recruit a Committed Campaign Team

- \checkmark Include representation from as many departments as possible
- $\sqrt{-}$ Point out the leadership opportunity that comes from being on the team

3. Set an Aggressive Campaign Goal and Track the Results

- √ Look at previous years campaign results
- $\sqrt{}$ Set an ambitious, but attainable, goal
- $\sqrt{}$ Goals can include dollars raised, percent of participation and number of leadership givers
- $\sqrt{}$ Make sure everyone is aware of the goal
- $\sqrt{}$ Post the goal publicly and update everyone frequently

4. Work with United Way to Develop a Dynamic /Workable Campaign Plan

- $\sqrt{}$ Meet with your United Way staff or volunteer early to help create a plan
- √ Use the United Way Campaign Toolkit @ <u>unitedwaysiouxland.com/campaign-toolkit</u>
- ✓ Ask about alternative ways to hold your workplace campaign. I.E. Electronic pledging, roll-over campaign, virtual campaign, etc.
- $\sqrt{}$ Plan some type of official kickoff event for the campaign
- \checkmark Plan special events to create excitement
- $\sqrt{}$ Secure incentives and/or raffle items

5. Conduct a Leadership Giving Campaign

- $\sqrt{}$ Hold a special meeting for leadership givers
- √ Make sure to include United Way Young Leaders in those leadership givers
- $\sqrt{}$ United Way can provide you a list of your leadership givers
- $\sqrt{}$ Discuss leadership giving throughout the campaign
- Provide special recognition for leadership givers

6. Hold Meetings (Rallies) for ALL Employees

- √ Show how United Way helps the community
- $\checkmark\,$ Don't forget about remote employees or employees who work from home be sure to hold virtual rallies for them
- $\sqrt{}$ Door prizes incentivize employees to participate in rallies either in-person or virtually
- $\sqrt{}$ Ask an employee to share their personal story on how United Way helped them
- $\sqrt{}$ Educate everyone about the positive changes their gift makes in Siouxland
- \checkmark Follow up with ALL employees

7. Promote Your Campaign

- $\checkmark\,$ Advertise your campaign in multiple ways. I.E. Team meetings, company internet, posters, word of mouth, etc.
- √ Invite EVERYONE to give regardless of the amount

8. THANK, Recognize and Report

- √ Make sure you thank EVERYONE involved with the campaign. Donors, team members, management, etc.
- $\sqrt{}$ Report your results to United Way and to your fellow employees
- $\sqrt{-}$ Conduct a debrief and keep notes for next year
- $\sqrt{}$ Distribute any incentives and/or prizes



Strategies for Your Workplace Campaign

Possible Hesitation:

"Employees already give so much." **Answer:** "That's great! It means they understand the importance of supporting the entire community."

Strategy:

Make sure everyone is educated about United Way and our programs and initiatives.

- Don't be afraid to make an ask. Most employees expect it and are ready to give.
- Be sure to thank your employees for their entire contribution to our community, whether it is their time or financial support. They should feel really good about all they do.

Possible Hesitation:

"We have fewer employees than last year." **Answer:** *"We know there have been many changes in a workforce and we are here to support you and your employees."*

Strategy:

- Share success stories. They can be inspiring and motivating to your employees.
- Make it a competition. Look at individual departments and challenge them. You'll be surprised how competitive it can get.
- Promote payroll deduction. On average, a contributor who gives through payroll deduction will give four times more than cash or a check.

Possible Hesitation:

"You only have 1-2 minutes to speak ... "

Answer: "Thank you for allowing us to present United Way to your staff."

Strategy:

- United Way recruits people and organizations who bring passion, expertise, and resources needed to get things done.
- Giving to United Way is the most efficient and powerful way for you to invest in our community.
- United Way is not a short-term investment; it is about lasting change. We work together to address our community's most critical problems for the long term.
- We only invest in programs with results that are measurable, sustainable, and meet current community needs.

Possible Hesitation:

"We have a small budget/no budget." **Answer:** *"With a little creativity, a campaign can be fun and successful without any budget at all!"*

Strategy:

Use experiences instead of items as incentives.

For instance, a close parking spot, ask your CEO to take the winner of a drawing out to lunch, or have the senior leadership team wash cars.

Possible Hesitation:

"We have multiple locations/shifts."

Answer: "Multiple locations and/or a non-office environment can sometimes be a challenge. Proper planning can help."

Strategy:

- Create a campaign committee with a person from each location/department. They should also help with planning and solicitation.
- Don't leave anyone out. Host a fundraiser that everyone can participate in like a bake sale, or a jeans day.
- Try holding separate events for different locations or shifts. Make sure they receive all necessary materials.

Possible Hesitation:

"I want my money to go where it is needed most and stay in my town."

Answer: "United Way of Siouxland has a group of 30+ volunteers that make sure that your money is only invested in programs that make a difference. They also have a group of Corporate Champions that cover United Way of Siouxland's low overhead costs.

Strategy:

Talk about the Community Impact Process. Point out how decisions are made on funding.

Show the United Way of Siouxland website and point out the list of Corporate Champions who ensure 100% of their donation will go to local programs, especially if your company is a Corporate Champion.

Don't	$\mathbf{\overline{A}}$	build a timeline with a start and end date.
Forget	$\mathbf{\nabla}$	set an aggressive goal and track results.
to	$\mathbf{\nabla}$	hold a kickoff rally with a speaker.

- te. ☑ ask everyone to give.
 - ☑ include United Way in your planning.
 - ☑ have FUN!!

The Nuts and Bolts of Your Workplace Campaign

Completing a successful workplace campaign is much easier with the right tools. Here are some suggestions for you to take advantage of. Even if you have run a workplace campaign before you may gain some new information in reviewing the following:

- Inited Way Lingo for Your Workplace Campaign (page 5)
- Resources for Your Workplace Campaign (page 10)
- How to Complete Your Pledge Envelope (page 11)
- How to Fill out a Pledge Form (page 12)
- Fun Ideas for Your Workplace Campaign (page 13)
- Rally Agenda for Your Workplace Campaign (page 14)
- The Impact of Your Workplace Campaign (page 15)





Keep in Mind:

- $\checkmark~$ Getting the leadership team on board with the campaign shows employees how important it is.
- If you do an electronic pledge form or campaign we suggest that you still include fun activities and an office rally or kickoff. Activities for remote employees may be different than those physically located within your business.
- ✓ Utilize United Way year around materials to let employees know how their money is making a difference
- \checkmark The biggest reason for people not giving is that they have not been asked. Make sure to invite EVERYONE to participate.
- \checkmark Making sure pledge forms and your pledge envelope are filled out completely ensures you get credit for the hard work you put into your workplace campaign

Resources for Your Workplace Campaign

Campaign materials can be found online in the Campaign Toolkit: unitedwaysiouxland.com/campaign-toolkit

- Campaign Video
- Printable copies of Pledge Forms (English and Spanish)
- Impact Posters
- Giving Card Merchant Listing
- Inited Way of Siouxland Logos
- Printable Jeans Day Stickers
- Everything You Need for Your Campaign

We Are Here For You 712-255-3551

UNITED WAY STAFF

Heather Hennings President

Terrie Binneboese

Vice President & Director of Community Impact & Le Mars United Way

Barb Uran Director of Finance and Administration

Aaron Beutler Director of Resource Development

Morgan Harpenau Community Impact & Communications Associate

Lou Ann Hass Administrative Assistant & Receptionist **Bryan Marshall** Labor Liaison

Sharon Messerschmidt Development Associate

Joan Shuck Administrative Assistant & Bookkeeper



100%

of your donations stay in our community thanks to the support of our Corporate Champions.

The Paperwork for Your Workplace Campaign

How to Complete Your Pledge Envelope

For United Way Use Only Batch # Date Processed by	
Call 255-3551 to have a United Way Representative pick up this envelope - Thank You!	
United Way Image: Constraint of the second seco	
Phone: 712-255-3551 Fax: 712-255-3028	
INSTRUCTIONS Please Complete Envelope Fully Attach cash/checks to pledge cards Enclose all Pledge Forms for United Way Make a copy for your payroll records Company:Org. #: # of Employees: Preparer's Name Bhene:	1 Contact information is essential for United Way in case there are any questions. # of employees is the only way we have of updating that information on a company each year.
Preparer's Email: Payroll Department Contact Name: Phone:	2 Completely filling in the ALL the donation information sections serves as a cross check and balance for the company's total giving.
Payroll Deduction	3 Accurate Payroll Deduction and Corporate Pledge information helps insure a smooth process for both the company and United Way.
Total \$(Emp + Corp + Special) MonthlyQuarterlyOther	4 Fill in the number of Giving Cards needed and UW will deliver them. If you have giving cards fill in the num- ber distributed.
Name: Name: Phone #: Phone #: Address: Address: State giving cards for you to distribute.	5 When your envelope is complete either deliver to UW or contact UW and a we can pick it up.

The Paperwork for Your Workplace Campaign

How to Fill Out a Pledge Form

Employee Name/ID Number & Past Gift Amount	United Way of Siouxland Way	
MY CONTACT & RECOGNITION INFORMATION PL Name Home Address	EASE PRINT United Way will not share your information for any purpor EmployerCityZip	1. Contact information is important for United Way so we can make sure and recognize people's giving.
EmailYears as donor to United Way: 1-5 6-9 10-1	Phone ()	
Gits of Stock or Property (Call United Way et 712-255-3551) To make a git using a credit (debit card go to: <u>unitedwaysioualand.com</u> <u>REEOCENTION</u> Wy git qualifies me for: Young Leaders Society C	and click DONATE or cell 712-255-3551 uning Society A.S. Garretson Tocqueville Society (\$1,000-49,999) (\$10,000 +) cesor I prefer to remain anony	 The best way for United Way to recognize leadership givers is for them to fill out the Recognition section.
k HEALTH \$50 Minimum (5009)	te after Jenuary 3tat will be added to the Community Impact Fund.) actic focus erea. This section is not for designating to a specific agency p	
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STOP Did you remember to give copies of pledge forms to your payroll department?











FUN Ideas for Your Workplace Campaign

Every workplace campaign is different. Yours can be shaped around your organization's culture. Try out some of these fundraising ideas to get everyone excited about the campaign, raise additional money and give more people the chance to aprticipat. Consult with United Way staff and volunteers for other ideas. * Great for virtual options.



PARKING FOR PLEDGES

Offer prime parking spots through a silent auction or a raffle to employees who give. Drawings can take place during your campaign or periodically throughout the year to encourage new employees to give.



HOST A TRIVIA CONTEST*

Have employees team up and compete against each other in a trivia tournament bracket. Teams buy tickets to participate and you can sell lifelines (e.g., 5 seconds to look up answer, ask someone in the room) to raise extra funds.



CHANGE WAR

Put containers in a central location. Employees drop in their spare change. Coins are positive while paper money is negative. The goal is to have more change than bills. The group with the highest point value wins. The money all goes to United Way

CORN HOLE TOURNAMENT



Employees sign up in teams of two and pay to play in the tournament. Use a bracket system to keep track of winners and have a play off. The winners get a special prize or small trophy.

CASUAL FOR A CAUSE

Sell "casual day" tickets that allow employees to wear jeans on certain days. Charge more to wear shorts. Consider selling jeans day tickets to be used before holidays and during winter months. Already wear jeans? Consider hats or favorite team jersey.

EXECUTIVE COSTUME CONTEST* Employees vote with their dollars for the executive they'd most like to see in a costume (e.g., pink bunny). The "winning" executive parades around the building or makes an appearance at a team function to announce the amount of money raised through the contest.





Measure for distance and accuracy with prizes. Charge per toss. Challenge departments to compete against each other or employees against management.

FOOTBALL TOSS

GUESS THE BABY/PET PICTURE*

Employees bring their baby/pet pictures to work and post the photos. Contestants pay to enter the contest and pay to match employees to their baby/pet pictures. The employee with the most number of correct matches wins a prize. Convert photos to black and white to level the playing field.



SILENT/LIVE AUCTION*

Offer a chance to win donated items, such as extra PTO, big screen TV, gift cards. Have each department put together a basket to create friendly competition.



MARSHMALLOW GOLF

Set up your own driving range, using marshmallows instead of golf balls. Award prizes for the longest and most accurate drives. Or set up your own marshmallow mini-golf course

Rally Agenda for Your Workplace Campaign

While no two organizations are alike, here is a suggested agenda for your kickoff event. You will adjust it to fit your organization's style and time limit. Even if you do your campaign virtually, this will serve as a good checklist to make sure you cover everything.

Welcome (Employee Campaign Manager)	1 minute
CEO Endorsement (Can be done Live, via Zoom or pre-recorded on video)	1-2 minutes
United Way Overview	
Staff Member or Volunteer	2-4 minutes
Campaign Video	2-4 minutes
Agency Speaker Story	2-4 minutes
Announce Company Goals and Incentives Explain Pledge Forms (Coordinator)	5 minutes
Thank You (Employee Campaign Manager)	1 minute

Total (approximately) 20 minutes



The Impact of Your Workplace Campaign

It is hard to realize how much of an impact you, your fellow employees and your organization really have on our community with your giving. Here are just some examples you can share about the difference United Way of Siouxland is making in the community with donations. More examples are available on our website: <u>https://www.unitedwaysiouxland.com/campaign-toolkit</u>



Supplies 300+ pounds of food to a local food pantry

Provides a backpack and school supplies for three children

Provides bedding, towels and essentials to a homeless mother moving into transitional housing





Covers the daily cost to deploy a disaster-response vehicle

Provides 100+ meals to children in an afterschool program

Provides four at-risk children with mental health assessments





Purchases 25 STEM kits for children to enhance their learning during the summer

Provides 167 gallons of milk to families in a shelter for a month

Provides emergency prescription medication assistance to 10 people in crisis



On behalf of all the children and families the efforts on Your Employee Campaign will benefit, THANK YOU! Know that the hard work and dedication proves "**WE ARE UNITED!**"



United Way of Siouxland fosters and promotes an inclusive environment that leverages the unique contributions of diverse individuals and organizations so that we can collectively and effectively create opportunities for a better life for all.

United Way takes the broadest possible view of diversity, going beyond visible differences to affirm the essence of all individuals including the realities, background, experiences, skills and perspectives that make each person who they are. Engaging the power of diverse talent and partners results in innovative solutions and the community ownership necessary to address complex community issues.

Diversity and inclusion are at the heart of what it means to LIVE UNITED.

United Way of Siouxland

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