CHANGE BEGINS WITH YOU.
ARE YOU IN?

United Way of Monroe County
Serving Monroe, Owen, and Greene Counties
MAKE THE BIGGEST IMPACT THROUGH UNITED WAY!

Employee Campaign Coordinators (ECCs) are the important connection in our community between the people who need help and the people that want to help. Your role as a United Way campaign leader is one of the most important, vital volunteer roles available. In this guide you will find all the tips, how-to’s, and ideas to make your campaign a success, including:

- Step-by-step instructions for planning your campaign
- Ideas to make your campaign fun and engaging
- Resources for additional information and ideas

Don’t forget that the United Way staff is also here to help you. Each workplace is different and unique and what works for one may not work for all. Want to bounce ideas off someone or have questions? Please reach out to us - we are here to help make you a success!

KEY CONTACTS AT UNITED WAY

Sherrie Shuler  
Resource Development Director  
sherrie@monroeenitedway.org

Hannah Hirsch  
Resource Development Assistant  
hannah@monroeenitedway.org

Chris Hazel  
Finance Director  
chris@monroeenitedway.org

United Way of Monroe County  
431 S. College Ave.  
Bloomington IN 47403  
812-334-8370  
www.monroeenitedway.org

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WHAT IS UNITED WAY?

United Way of Monroe County works with 24 certified member agencies and other partners to improve people’s lives and build a stronger community. By supporting agencies and initiatives that provide services in the areas of health, education, and financial stability, United Way ensures that people in crisis can get the help they need right away and address the underlying issues they face. At the same time, United Way helps people in Monroe, Owen, and Greene counties get the education and earning opportunities that will keep them from needing safety-net services in the future.

Thank you for your continued efforts and for your incredibly generous commitment to lead the United Way campaign. An investment in United Way is the single best way to help the most people in need in our community. To see your donation in action, visit www.monro unicledway.org/MyImpact.

Investing in Member Agencies
- American Red Cross, Southern Indiana Chapter
- Amethyst House
- Area 10 Agency on Aging
- Big Brothers Big Sisters of South Central Indiana
- Boy Scouts – Hoosier Trails Council
- Boys and Girls Clubs of Bloomington
- Catholic Charities, Bloomington
- Community Kitchen of Monroe County
- Girls Incorporated of Monroe County
- Hoosier Hills Food Bank
- Indiana Legal Services
- LifeDesigns

- MCCSC School Assistance Fund
- Middle Way House
- Monroe County United Ministries
- Mother Hubbard’s Cupboard
- New Hope for Families
- People and Animal Learning Services (PALS)
- Planned Parenthood of Indiana
- RBB School Assistance Fund
- Salvation Army
- Shalom Community Center
- Stone Belt
- Volunteers in Medicine

Leading Initiatives
- AFL-CIO Community Services
- Bank On Bloomington
- Born Learning
- Financial Coaching
- Financial Stability Alliance
- Free Community Tax Service
- Roadmap to Success
- Real Men Read

Supporting Community Partnerships
- Community Organizations Active in Disaster
- 3E Innovation Network
- IN211 Partnership
- Let’s Read
- Monroe Smart Start
- Nonprofit Alliance of Monroe County
- Nurse Family Partnership
- Stamp Out Hunger Food Drive
WORKPLACE CAMPAIGN QUICK CHECK LIST

Your campaign is an opportunity to participate in making our community a better place for all its citizens— and to invite your co-workers to do the same. Below are the basics of running a United Way campaign:

☐ Be our guest at the United Way of Monroe County Kick-off event (every September) and join in the Community Celebration in early spring. On both occasions, you'll be our guest for refreshments, camaraderie, and inspiration, and you'll learn more about the impact your gifts make throughout the community.

☐ Define roles and responsibilities within your organization or business including key volunteers to run the campaign, create fun events, and coordinate payroll.

☐ Determine your campaign cycle: activities, goals, dates, and campaign calendar

☐ Plan how you will promote the campaign through marketing, incentives, and fun activities.

☐ Kick-off your campaign!

☐ Send reminders and updates about your campaign and United Way to your co-workers. Keep it fun and informative. Then, kick back and feel great about helping people in your community.

☐ Collect pledge cards.
*Sometimes it can be beneficial to ask that all pledge cards be turned in, even if people don’t donate.

☐ **THANK DONORS!** Saying thanks is a big deal, because each donation is a big deal! Print off thank you notes from the campaign toolkit and drop a personal thank you on donor’s desks, or come up with your own way of saying thank you.

☐ Keep track of donations and report results organization-wide at the conclusion of the campaign. Everyone wants to know how much good their gifts accomplish!

☐ Once the campaign is over, all funds raised, along with pledge cards for all individual gifts, should be accounted for, sealed and signed in the campaign envelope provided. **Your payroll department should keep copies of the pledge cards and the front of the completed campaign envelope. Original pledge cards must be returned to United Way. ALL INDIVIDUAL GIFTS MUST BE ACCOMPANIED BY A COMPLETED PLEDGE CARD.**

☐ Let United Way know your campaign funds are ready to be picked up, or if you work through a national processor, email us your campaign total.

☐ Share your campaign with United Way of Monroe County with pictures and posts on your website, and social media. Don’t forget to “like” our Facebook page! You can find us on Twitter and Instagram, too. If you didn’t take any pictures, contact United Way to set up a time to have a photos taken.

☐ Know that your efforts and those of your co-workers will have life-long effects on other’s lives. Your help is deeply appreciated by many, so take a moment to feel good about the time and work you expended to make this a successful campaign. And, start planning for next year!
HOW TO RUN A WORKPLACE CAMPAIGN

Below are the ideas from the previous checklist fleshed out a bit more for your consideration. Remember, United Way staff are here to help you in any way possible. Simply call or email: 812-334-8370 ext. 13 or sherrie@monroeunitedway.org.

#1: Determine Internal Roles & Responsibilities
Making sure you have the right people in place is important to running a great campaign! The size of a campaign team you need will depend on the size and structure of your business or organization. The key is: Determine how many volunteers you need to easily communicate with employees in a way that makes sense. Once you establish which people (or in the case of a large workplace, what size committee) you may need, set-up a team meeting to discuss roles and responsibilities, monitor progress, and evaluate your campaign efforts as you go through your campaign period.

TIP: Don’t forget to include a marketing, HR, and payroll staffer in your initial campaign planning, if your workplace is large enough to employ those positions. They can play a vital role in a large workplace campaign!

Examples:

Do you have 6 employees total in your office?
If yes, you probably only need one or two people to manage your campaign.

Do you have 50 or more, with multiple departments and functions within your business?
If yes, then you probably want to establish a committee with a representative from each of the major departments to create a campaign committee.

#2: Determine Your Campaign Dates
Having a beginning, middle, and end of a campaign are a must. This helps define and drive the momentum of your workplace campaign. The length of your campaign can range from a few days, to a week, to a whole month. Most campaigns run for a couple of weeks. It’s entirely up to you and your workplace! Discussing what makes sense in your situation should be one of the first things you do as a team (or, one of the first things you decide if you are a team of one!). These dates will determine when to kick-off your campaign, send reminder messages, hold an office special event, and establish a deadline for your pledge cards to be received.

Our campaign will run: _____/_____/______ to  _____/_____/______.

#3 Set Goals
Set a healthy, but attainable goal. You want your workplace to be able to celebrate and know that they accomplished something meaningful that will impact other’s lives. Then, tell your co-workers what the goal is so that everyone is included as a part of the joint effort. If you would like help setting your goal, feel free to call on a United Way staff member to help!

Tip: Depending on your situation, sometimes it is best to focus on raising a certain dollar amount; other times, especially for new campaigns or campaigns that need to grow, it can be a better option to focus on the number of people who participate by making a donation of any size.
Examples:
- Raising $5K at your workplace
- Setting a goal to have 50%, 80%, or even 100% participation of employees, regardless of the dollar amount that might be raised

#4: Plan Campaign Timeline & Activities
Once you have a team, a goal and dates, it's time to decide how you will make your campaign fun and engaging along with setting deadlines for your campaign activities. The scope and activity level surrounding your campaign is determined by the desired outcome of the organization, what you can take on as the ECC, and what your team is willing to help you accomplish! The personality of your workplace also plays an important role. What might work for one workplace, might not work for yours. What do your co-workers like to do for fun? How do they prefer to receive information?

Elements of a United Way Workplace Campaign

Kick-Off
Many organizations hold a kick-off event or activity. These can range from hosting donuts and coffee and having a United Way representative come speak briefly, to full blown, sit-down luncheons. The sky is the limit and there is always something on any scale you can do to kick-off your campaign that is fun and engaging for your co-workers. The key is to make it known to employees what United Way is all about, what you will be doing for your United Way campaign, and how they can participate. Some organizations will build a kick-off into an existing regular meeting where many staff members will already be present.

Special Events
These activities are often great for raising some additional funds, doing something fun, and helping raise awareness about the campaign.

Examples: Donate a few bucks to wear jeans on a Friday, hold a bake sale, enter a drawing for a prime parking spot for a week, or hold a chili cook-off.

Incentives
Incentives can be very helpful and a great way to get people involved in a campaign. These can be incentives to attend meetings, return pledge cards, or to give. They can be raffles, giveaways, early bird contributions, or competitions between departments, just to name a few!

Incentives shouldn’t be expensive and can be a simple token or something donated by an employee or the company.

Examples:
- Tickets to an event
- Magazine subscription
- Gas card
- Movie tickets
- Gift cards
- Baked goods
- Yard service
- Coffee served to your desk each day for a week
- Casual dress days
- Company logo item – shirt, toys, mugs, etc.
- Time off
- Pizza party
#5: Messaging & Campaign Communications
This is where your marketing person can come in handy. Decide how you will announce the important info about the campaign at your workplace with instructions of how employees can participate. Do you have an intranet where you can post information? Can your CEO send an email to all staff inviting them to participate in the campaign?

You will want to make sure that the information people need to know reaches them, including:
- Beginning and end of campaign dates
- Dates of any special events or kick-off event/activity
- Deadline to turn in pledge cards
- Who is to receive the completed pledge cards in your office
- Why giving to United Way is a good thing and how donating helps our community! (See the accompanying Resource Guide for more information on the work of United Way in Monroe, Owen and Greene counties.)

Make sure you have the essential campaign supplies from United Way. Touch base with your United Way representative before – or during – your campaign to request the quantities of supplies you will need.

Remember to keep the campaign visible around the workplace!

Many items can be downloaded from the online campaign toolkit found at: www.monroeunitedway.org/campaigntoolkit.
Additional posters and t-shirts can be requested from United Way of Monroe County.

Campaign Email Messages:
The most basic campaign messages should be:
1. A kick-off email to be sent at the beginning of the campaign
2. A follow up email midway through with an update and reminder
3. An end-of-campaign message right before the close of your campaign

Do you have a larger campaign and want to get fancy? Make a list of past donors and send one message to them thanking and acknowledging past support. Then send a different email to new/prospective donors asking for their participation in the campaign. Recognizing past support can help renew gifts that were made by employees during the prior year’s campaign.

RESOURCE: Not sure what to write? Visit our campaign toolkit online at www.monroeunitedway.org/campaigntoolkit for sample emails and sample text for your website. Feel free to copy entirely or edit to your needs!

Be the expert! You will probably receive some questions from co-workers. Be prepared with an answer by visiting the ‘What is United Way’ section (on page 2) and our FAQ’s in the accompanying Resource Guide to familiarize yourself with United Way. To read more about United Way of Monroe County, you can also visit our website: www.monroeunitedway.org

Get a question you can’t answer or just want to talk over your plans with United Way? Just send us an email at sherrie@monroeunitedway.org or give us a call at 812-334-8370 ext. 13.
Thank Donors:
Generous donors are far more likely to give again next year if you say thanks right away! We will acknowledge gifts once they are received, but because of processing times and differing campaign lengths, that information can take a while to reach us. You can send a thank you note right away and we encourage you to use the branded thank you notes included in your campaign packet.

RESOURCE: Download additional printable thank you cards from the online toolkit: Visit: www.monroeunitedway.org/campaigntoolkit.

#6: Campaign Wrap-Up
Pledge Card Collection/Payroll Deduction:
Make sure your HR or payroll department is ready to enter gifts that will be payroll deduction from employee’s paychecks. Payroll should keep copies of all the pledge cards with the originals coming back to United Way. If your campaign is near the end of the year, make sure you know the last date that your payroll office will need to receive these deductions in time for January paychecks.

Turning in your Campaign Pledge Cards to United Way:
So, you’ve finished your campaign. Congrats! Make sure you turn in all original completed pledge cards, keeping paper copies for your organization’s records. All donations should be kept confidential and protected. Account for all of your campaign contributions by filling out the front of the campaign envelope completely and enclosing all campaign funds inside. Sign and seal the envelope.

Contact United Way of Monroe County to let us know your campaign is complete and ready to be picked up. If you utilize online giving through a national headquarter office instead of pledge cards, let United Way of Monroe County know your campaign total so your hard work will be recognized!
Contact Sherrie at 812-334-8370 ext 13; sherrie@monroeunitedway.org or Chris at 812-334-8370 ext 12; chris@monroeunitedway.org.

IMPORTANT CAMPAIGN NOTES:

- PLEASE TURN IN YOUR CAMPAIGN FUNDS AND PAPERWORK NO LATER THAN TWO WEEKS AFTER YOUR CAMPAIGN CLOSES.
  Turning in your campaign allows us to deposit checks, process donations, and thank donors in a timely manner.

- Partial campaign drop-offs can also be a good idea if your campaign runs on a longer cycle or generates a lot of cash and checks. Donors appreciate their checks being cashed promptly – and cash laying around is never a good idea! We can provide extra campaign envelopes to you as needed.

#7: Share your Campaign & Be Recognized!
Celebrate your co-worker’s generosity and caring! We want to hear about – and see – your campaign! Remember to snap pictures of any great moments to display at your office and to share with us. We can come take a picture of you and your group to share on our media outlets!
Either email photos to us or email our staff to arrange for a photo shoot: Contact: Jenn at: jenn@monroenitedway.org.

Be sure to follow us on Facebook, Instagram, and Twitter! Share your United Way moments on your feed and ours at monroenitedway.org.
www.facebook.com/MonroeUnitedWay
www.instagram.com/monroenitedway/
twitter.com/MonroeUnitedWay

Thank you!!
CHANGE BEGINS WITH YOU.

ARE YOU IN?
Make a real and lasting impact in your community. Stand up to ensure families have opportunities and everyone can meet basic living needs.

You have the power to create great change.

ARE YOU IN?

To read about how your donation is fighting for our community, visit monroenitedway.org/MyImpact.