Dear Employee Campaign Coordinator (ECC),

Thank you for serving as your company’s coordinator for this year’s United Way campaign. If you’ve done it before, welcome back. If you’re new to the role, welcome aboard. Either way, I’m honored to have you on our team.

As the ECC, you become the face of United Way at your workplace, and your energy and commitment directly affect the success of the campaign. So this guide offers tips, insights and best practices to make your job easier and ensure a win for everyone involved.

I’d also encourage your donors to check into volunteering opportunities with United Way. Giving your time and talents to vital community efforts can be intensely rewarding. It can also help your company promote team building, staff cohesion and corporate loyalty, so talk to your United Way team about ways to make this happen. And don’t hesitate to call them with any other questions or needs. They stand ready to support you in every possible way.

Thank you again for helping us mobilize the caring power of our community to improve lives in North Texas. United, we’re helping those who want to do good, do great.

Sincerely,

Troy Aikman
NFL on Fox Analyst
2017-2018 Campaign Chair, United Way of Metropolitan Dallas
Tackling The Toughest Problems Facing North Texas

United Way of Metropolitan Dallas isn’t a single-issue charity. We treat 360° of need. We tackle complex social problems by surrounding North Texas with local solutions in the areas of Education, Income, and Health; the essential components of a thriving community.

We don’t just do good, we go farther and do more. And when you support us, you do, too. Because united, we help those who want to do good, do great.

What We Do

We identify and evaluate the best programs in our community.

We award grants to hundreds of organizations so they can do more.

We help them improve effectiveness, efficiency, and navigate the non-profit world.

We set robust goals and measure progress.

We develop and invest in new solutions to longstanding problems.

We raise awareness, mobilize volunteers, create partnerships and advocate to address critical issues.

We only invest in our local community; we’ve been a trusted community partner for over 90 years.
When kids fall behind in school, they get frustrated and check out before they drop out. We fight to change this. That’s why we support some of the best educational programs in North Texas. By 2020, we expect 60% of all students who graduate to be prepared to succeed in whatever comes next. Since 2011, we have invested $57 million and currently fund 65 programs that lay the groundwork for their success.

Poverty comes in many forms. You may see it among your neighbors, co-workers or friends, but it’s not a permanent condition. That’s why we provide the tools and know-how to help North Texans get and keep better jobs, establish savings and hold on to more of what they earn. Our goal is to permanently move 250,000 people out of poverty by 2020. Since 2011, we have invested $42 million and currently fund 81 programs that put our residents on the path to financial stability. This includes 24 basic needs programs.

Good health influences everything from how well a child can learn to how much an adult can earn. Its effects truly last a lifetime. Our goal is to ensure that all North Texans have access to nutritious food, quality health care, a safe place to call home and the chance to lead healthy, productive lives. Since 2011, we have invested $48 million and currently fund 70 programs for healthy living.
1. PREPARE
Plan your campaign in advance and recruit a strong team to help lead your effort.

2. INSPIRE
Share United Way’s story with employees and show how their support ensures a brighter future.

3. ASK
Encourage and ask everyone to give.

4. THANK
Make sure everyone feels appreciated for their generosity.

THE FOUR KEYS TO RUNNING A SUCCESSFUL CAMPAIGN

Volunteers kick off “End Summer Hunger” campaign.
CAMPAIGN IDEAS

STEPPING UP TO THE PLATE

Choose United Way champions to act as ambassadors. They will organize and motivate employees to give in their department, branch or geographical location.

PARKING FOR PLEDGES

RealPage offers numerous prime parking spots to donors who make significant gifts. The best of those spots are given through a silent auction throughout the campaign.

EXECUTIVE INVOLVEMENT

Kimberly-Clark Corporation’s CEO joins employees and participates in all campaign activities.

PREPARE

Remember you’re not alone; United Way will help you assess the strengths of last year’s campaign and suggest areas for improvement.

1. Schedule time with United Way
2. Develop a timeline (See pg. 12)
3. Set goals for the campaign
4. Run the campaign
5. Wrap up the campaign
CAMPAIGN TIMELINE

Below is a “perfect world” timeline. Your own should reflect the amount of time you have to plan and other factors pertinent to your campaign. Your United Way team will help you develop one that’s right for you.

- **12 WEEKS**
  - Plan campaign with United Way. Determine dates, length, locations and fundraising goals.
  - Meet with previous ECC and team to review challenges and successes.
  - Finalize steering team and campaign volunteer structure.

- **10 WEEKS**
  - Recruit additional campaign committee members.
  - Brief senior executive leadership and choose Giving Society Ambassadors.
  - Begin regular United Way team meetings and discussions about digital giving platform.

- **8 WEEKS**
  - Configure United Way’s digital giving platform.
  - Develop Giving Society strategy, identify prospects and set events.
  - Develop theme and calendar of events with your United Way team.

- **6 WEEKS**
  - Develop communication plan – campaign posters, web messages and other.
  - Develop volunteer training schedule, meeting agendas and materials.

- **4 WEEKS**
  - Train Campaign Ambassadors by business units; 1 Ambassador to 25 people.
  - Tell the United Way story through articles on your intranet site.
  - Plan and recruit volunteers for Days of Impact projects.

- **2 WEEKS**
  - Host Tocqueville Society campaign event.
  - Ask Tocqueville Ambassador to follow up with prospects.
  - Train Campaign Ambassadors.

- **1 WEEK**
  - Host Leadership, Builders and Young Leaders campaign events.
  - Ask Leadership Ambassador and Young Leaders Ambassador to follow up with prospects.

- **LAUNCH**
  - Host general employee kickoff event.
  - Deploy Ambassadors to talk about United Way with staff and ask them to consider participating.
  - Send initial pledge email and reminders.
  - Share daily campaign tracking report.
  - Host business unit events to raise awareness and increase participation.
  - Continue employee education meetings with United Way.
RECRUIT YOUR TEAM

A thoughtfully assembled team of campaign volunteers will increase the success of your campaign and make your job easier. The size of your team depends on the size of your organization. The following list of titles and responsibilities are suggested roles each team member can play in your overall success. And don’t forget to include your United Way team.

Campaign Chair
- Supports the campaign.
- Endorses Tocqueville Society, Leadership Society and Young Leaders Society campaigns.
- Selects ECC, Campaign Co-Chair, Tocqueville Ambassador, Leadership Ambassador and Young Leaders Ambassador.
- Increases corporate gift.

Employee Campaign Coordinator (ECC)
- Develops campaign timeline with United Way team.
- Serves as liaison between campaign committee and United Way staff.
- Coordinates execution of overall campaign plan.
- Arranges campaign meetings and trainings.
- Monitors and reports results.
- Coordinates with United Way Annual Campaign Council representative, if applicable.

Communications Coordinator
- Develops campaign communication timeline.
- Works and executes with United Way team to develop talking points, kickoff reminder, and thank you messages.
- Identifies internal opportunities for year-round United Way communications.

ECC Successor
- Provides primary backup to ECC and prepares to serve as ECC next year.

Tocqueville Ambassador
- Provides executive sponsorship of Tocqueville Society campaign.
- Assists ECC with communication to current and prospective Tocqueville Society members.

Leadership Ambassador
- Coordinates both Builders and Leadership Society giving campaigns.
- Assists ECC with communication to current and prospective Builders and Leadership Society donors.

Young Leaders Ambassador
- Coordinates Young Leaders Society giving campaign.
- Assists ECC with communication to current and prospective Young Leaders Society donors.

Campaign Ambassadors
- Connects one-to-one with employees. The ideal ratio is one ambassador.
- Choose veteran employees, well-respected new employees and/or emerging leaders.

The key focus of the campaign at Texas Instruments is education. All aspects of the campaign, such as training, volunteer events and solicitation, have education woven into their plans to provide an understanding of United Way programs and the importance of individual employees’ support.
The campaign team at Alliance Data promotes the campaign through lobby signage, email messages, intranet articles, in-person events, and desk drops.

**CAMPAIGN IDEAS**

**GET ACTIVE**

Celanese Corporation’s annual golf tournament benefits United Way. Consider hosting a golf tournament, silent auction, walk or run – all easy ways to raise money for your campaign.

**EXECUTIVE ENGAGEMENT**

DFW Airport employees that increase their giving by $10 or more from the previous year are entered into a drawing. The lucky winner swaps jobs and pay with DFW Airport’s CEO for a day. This is a fun way to increase donor gifts while offering a fun experience for the employees.

**ALL ACROSS THE METROPLEX**

Frost Bank hosts breakfast kickoffs at every single branch location with a brief presentation.

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**IDEAS FOR PROMOTING YOUR CAMPAIGN**

- Group presentations
- Letter from your CEO
- Kiosks
- Posters/ Flyers
- Employee testimonials
- Email messages
- Volunteer projects
- Company newsletter
- Intranet site
- Lunchroom table tents
- Success stories
- Personalized company campaign video

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**BEFORE CAMPAIGN**

- Raise awareness.
- Thank prior year donors.
- Share prior year results.
- Share activities schedule.

**DURING CAMPAIGN**

- Inform how to pledge.
- Share success stories.
- Send donation reminders.
- Show campaign videos.
- Offer United Way speakers
- Host awareness events.
- Inform about incentives or matching corporate gifts.
- Offer volunteer opportunities.

**AFTER CAMPAIGN**

- Highlight campaign results.
- Thank donors for contribution.
- Prepare wrap up and hand off to next year’s ECC.

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**INSPIRE**

This section includes ways to spread the word about your company’s campaign and encourage contributions to our community.

Promote your campaign before, during, and after, as a short, fun initiative once a year. Inform employees of campaign dates and provide them with information.
UNITE FOR CHANGE

Your company may choose to partner with United Way to host large-scale volunteer projects. Unite for Change represents annual projects that engage significant numbers of volunteers in major community service initiatives.

These projects provide corporations with engaging volunteer opportunities for their employees, flexible programming and marketing opportunities.

Your company may reserve volunteer and branding opportunities by sponsoring one of these projects.

VOLUNTEER OPPORTUNITIES

DAYS OF IMPACT

When you volunteer, you do more. Instead of addressing one issue, you help treat 360° of need. Whether it takes place in the community or in the office, a Day of Impact is an opportunity for donors to work together to have a direct impact on people in North Texas. It can also be a great team-building event.

Contact your United Way team to discuss the best approach to volunteerism for your company.

SAMPLE PROJECTS IN THE COMMUNITY

- Beautification projects.
- Tutor or mentor school-aged students.
- Assemble toiletry kits.
- Conduct school supply drives.
- Create activity books, snack baskets and packages for families.

UNITED WAY VOLUNTEER LEADERSHIP

United Way is volunteer-led and offers ongoing opportunities to serve our community by participating in grant panels and various leadership committees. Committee volunteer selection varies based on criteria, including volunteer experience and seasonal recruitment.

To learn more, please contact your United Way team.

THANKS TO OUR SPONSORS

Information provided is as of print date. Please confirm final details with your United Way team.
Asking for donations is the most important step of your employee campaign. It’s also critical to explain that donors have two ways to contribute:

First, gifts made directly to United Way achieve the greatest benefit in North Texas. Instead of addressing one issue, donors help treat 360° of need by supporting 200+ programs that surround North Texas with local solutions.

Programs are chosen by Competitive Grant Panels made up of corporate donors, community members and experts from local philanthropic organizations who understand the needs of our community.

Second, as a community service, United Way also makes it possible for donors to choose specific service providers to receive their donation.

In either case, donors are invited to join the United Way giving society appropriate for their giving level. All giving societies offer volunteer opportunities, events and networking as part of a meaningful year-round engagement.

UNITED WAY GIVING SOCIETIES
- Tocqueville Society ($10,000+)
- Builders Society ($2,500+)
- Leadership Society ($1,000+)
- Young Leaders Society / 35 and under ($250+)

ASK
The #1 reason employees say they don’t contribute is because they were never asked.

Asking for donations is the most important step of your employee campaign. It’s also critical to explain that donors have two ways to contribute:

First, gifts made directly to United Way achieve the greatest benefit in North Texas. Instead of addressing one issue, donors help treat 360° of need by supporting 200+ programs that surround North Texas with local solutions.

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UNITED WAY GIVING SOCIETIES
- Tocqueville Society ($10,000+)
- Builders Society ($2,500+)
- Leadership Society ($1,000+)
- Young Leaders Society / 35 and under ($250+)

TIPS
Start at the top—ask company leadership to set the example by making contributions early.

Remember to include off-site and remote employees, and create options for online meetings.

Highlight corporate support, including programs that match employee contributions.

CAMPAIGN IDEAS
CONNECT TO THE CAUSE
PepsiCo/Frito-Lay knows that when employees volunteer, they give! Consider participating in volunteer projects throughout the year like PepsiCo/Frito-Lay employees.

SHOPPING FOR A CAUSE
Bank of Texas invited female Dallas business leaders for an afternoon of networking and shopping at Kendra Scott. Twenty percent of sales benefited United Way and their campaign.

NOT A SINGLE STONE UNTURNED
Ambassadors at AAA are tasked to make the “asks” of 100% of employees. AAA also sees benefit in a United Way info session during new hire orientation, and a retiree program for loyal donors.
THANK

Thanking everyone involved, from those who donated to those who helped implement the campaign, cannot be overemphasized and goes a long way to ensure their long-term support.

There are two great ways to thank donors:

THROUGH UNITED WAY

- Share donor details so United Way can thank them individually and how their money is making an impact in our community.
- Donors who gave at the Tocqueville, Builders, Leadership and Young Leaders giving levels are eligible for membership in United Way Giving Societies.

It’s important to provide your United Way team with these donors’ contact information so they can receive ongoing news about the exciting events, networking activities and rewarding volunteer opportunities for which they qualify.

THROUGH THE WORKPLACE CAMPAIGN

- Place campaign thank you posters around your workplace.
- Send thank you letters or e-cards from your CEO, Campaign Chair, Campaign Co-Chair, ECC, Tocqueville Ambassador, Leadership Ambassador and Young Leaders Ambassador.
- Highlight givers of a certain level in a public space.
- Host an event for donors who give at a certain level.
- Give a special gift or host a special reception for campaign team leaders and your campaign committee.
- Publicize results via your company newsletter, email or intranet.
- Celebrate your success!

CAMPAIGN IDEAS

CAMPAIGN THANK YOU IDEAS

AT&T’s CEO hosts an appreciation event for all AT&T Tocqueville donors.

LUNCH-AND-LEARN

Fluor Corporation hosts a separate lunch for each of their Giving Societies to share more information about their United Way campaign.

WEEKLY PRIZES TO INCREASE DONATIONS

To encourage new and increased donations, Oncor has weekly prize drawings for all new donors and all past donors that increased their gifts in the current campaign. Additionally, all contributors, regardless of giving level, are eligible for end-of-campaign drawings.

BRIGHT IDEA

EY encourages saying “thank you” throughout their two-week campaign. They host breakfasts, lunches and happy hours to acknowledge progress and encourage participation. Donors are also thanked with prizes, and everyone who participates at a certain level is able to wear jeans through the end of the year.
How long should our workplace campaign run?

The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources for both the ECC and employees. One to two weeks is sufficient to kick off your campaign, get the message out effectively and make your ask without overburdening staff. An exception could be if you are the ECC at a very large company, or multi-site company.

When should our workplace campaign take place?

Most campaigns take place between July and November, but they can happen at a time that is best suited to your organization.

Are donations to United Way tax deductible?

Yes. For additional information, please visit UnitedWayDallas.org

How can employees give?

United Way offers a number of options, including payroll deductions, credit and stock. Please connect with your United Way team.

When does payroll deduction start?

Payroll deduction usually runs from January 1 through December 31. However, United Way does not set your payroll schedule; it is a company decision.

How can I work it into my busy schedule?

The best way is to recruit a committee, assign tasks and start planning early. Also be sure to use your United Way team. Let them know your limitations and together, you can come up with a proper plan.

Can employees designate their donation?

As a service to donors, we make it possible to specify a program to receive your donation. However, the direct investment of your philanthropic dollars to United Way do more. Instead of just addressing one issue like hunger or homelessness, you help treat 360° of need by supporting 200+ programs that surround North Texas with local solutions in the areas of Education, Income, and Health; the essential components of a thriving community.

Programs are chosen by Competitive Grant Panels made up of corporate donors, community members and experts from local philanthropic organizations who are in touch with the needs of our community.

La Quinta Inns & Suites has a campaign team of four. Two co-chairs serve as the primary ECC for a year. The next year, the two past chairs stay on the team for support and the other two become ECC successors. This succession plan helps increase campaign growth year over year.
Your United Way Team
Contact your United Way Team to ask questions or get information to help you run a successful campaign. They are here to help you energize, engage and inspire your company’s employees. They are your greatest resource and an extension of your team.
Contact them for help, information about volunteer opportunities and strategies for implementing your campaign.

Employee Campaign Coordinator Guide
To energize and educate your committee and campaign team, provide this useful guide.

United Way Overview
The overview provides our goals, statistics on community needs and more, including an in-depth overview of each of our giving societies: Tocqueville, Women of Tocqueville, Leadership, Builders and Young Leaders.

United Way Videos
Share videos of people United Way has helped and inspire your colleagues to get involved! It’s easy to share on social media using the quick share buttons on the homepage feature stories.

Workplace Campaign Tool Kit
Available on the United Way website, this tool kit includes campaign materials, success stories, photos, logos, sample emails, etc.

RESOURCES

Posters
Placed in common areas, these help educate and inspire employees throughout your campaign.

United Way Videos
Share videos of people United Way has helped and inspire your colleagues to get involved! It’s easy to share on social media using the quick share buttons on the homepage feature stories.

Thank you
For volunteering your time as an Employee Campaign Coordinator!
TREATING 360° OF NEED

United Way of Metropolitan Dallas

UnitedWayDallas.org