ECM Handbook
2019 - 2020 Campaign
Welcome
To United Way’s
Campaign Team!

Thank you for stepping up and coordinating your organization’s United Way campaign. You are critical to our success because your efforts will help impact the lives of hundreds of thousands of people in need in our community. When they are stronger, we all benefit.

Whether this is your first time as an Employee Campaign Manager (ECM) or you are a seasoned veteran, this guide will help you inspire others to help address our community’s most pressing issues.

Thank you for leading the way. You are creating long-lasting change for the betterment of our community.

Contents

Your Role ......................... 2
Best Practices .................... 3
Meeting Formats and Agendas .... 5
Ideas and Incentives ............... 7
Campaign Checklist ............... 8
Campaign Wrap Up ............... 9
About UWSWPA .................. 11
Donor Groups ..................... 13
Volunteering ..................... 15
FAQs .............................. 16
Contact and Social Media .......... 18
Your role as an Employee Campaign Manager (ECM)

**WHO?**
An ECM is someone who helps his or her organization work with United Way and leads the annual United Way campaign through planning, organization, implementation, and evaluation.

**WHY?**
- Become a caring champion for the people in our community who are in need of help, hope and support to improve their lives.
- Make a real difference in the lives of hardworking families struggling to make ends meet, kids who deserve a strong start and bright future, women facing unexpected crises, veterans transitioning back home, vulnerable seniors who need companionship, and people with disabilities fighting for the right to live and work independently.
- Positive change starts with the compassion of one person. And as an ECM, that person is you.

**WHAT?**
- Work with your UW Corporate Relations Manager to educate employees about United Way and community issues — connecting them with their community and allowing them to make informed decisions about how they can make a difference.
- Assemble a committee of Champions who will help build support
- Work with your committee and leadership to set goals to increase participation, leadership giving, monetary giving, and special events
- Hold a campaign kickoff and coordinate other special events
- Distribute materials and pledge forms or pledge site link to colleagues; submit campaign report forms to your UW campaign manager
- Find ways to engage year-round through advocacy and volunteerism

**BENEFITS:**
- Showcase your leadership and project management skills
- Meet other United Way volunteers across industries
- Have fun while connecting with colleagues at your workplace
Best Practices

MEET WITH YOUR CEO
• Confirm CEO’s support for the campaign and ask him or her to be engaged
• Inquire about a corporate gift
• Secure a budget and make sure time is allocated for campaign activities
• Set goals and strategies and plan for success

FORM A STRONG CAMPAIGN COMMITTEE
• Recruit co-workers to serve as Champions; seek representation from all departments and demographics
• Involve overlooked groups: ask a retiree or past leadership giver to serve on the team and lead peer to peer solicitation

PLAN AND PREPARE
• Meet with your UW Corporate Relations Manager to plan campaign and identify growth areas
• Provide UW with current company information (address, number of employees, CEO name, phone, email)
• Review Employee Campaign Checklist and timeline
• Set goals and establish key dates for activities

CONDUCT AN EDUCATIONAL AND FUN CAMPAIGN
• Announce meeting dates and special events (what can you do that will engage all employees?)
• Invite your UW Corporate Relations Manager and agency speaker to present at kick off and meetings
• Distribute print material, email, and social media; place banners, posters and thermometers in visible locations
• Tour or volunteer at a UW-funded agency to get an up-close work on how donations can change lives of those in the community
• Distribute pledge forms and/or link — add incentives for those who give

SPEAK UNITED
All the resources you need to run a successful United Way Campaign are at your fingertips.
You will find tips, best practices, inspiring videos, posters, email templates, volunteer opportunities and more.
Visit uwswpa.org/speak-united/to help you get started.
CONDUCT A LEADERSHIP CAMPAIGN
• Ask your CEO to recruit a senior staff member and active donor to serve as Leadership Chair
• Review last year’s efforts and results; set realistic goals for new giving
• Get Leadership materials from your UW campaign manager
• Identify employees who gave at Leadership levels last year
• Identify current donors who give $500 or more
• Host a Leadership reception; invite current Leadership givers and prospects
• Recruit current Leadership givers to make peer-to-peer asks
• Distribute necessary Leadership information (Women’s Leadership Council, Bridges Society, Tocqueville Society)
• Send a thank you note to Leadership givers and acknowledge them at a special event

WRAP UP AND SAY THANKS
• Collect pledge forms, print pledge site transaction report — give to payroll and send to UW
• Schedule a wrap-up meeting with your United Way campaign manager and your committee
• Send a letter from your CEO announcing company’s results
• Thank everyone for their contributions of time, voice, and money

CONNECT YEAR ROUND
• Establish a New Hires program so new employees have the opportunity to support
• Distribute UW emails, organized volunteer opportunities, and events to co-workers
• Organize company-wide volunteer opportunities, contact your UW campaign manager for more info

WHAT ARE SOME OTHER BEST PRACTICES THAT YOUR ORGANIZATION Follows?

WHAT BEST PRACTICES AT YOUR ORGANIZATION WORK WELL? WHAT CAN YOU IMPROVE?

NOTES AND IDEAS:
Meeting Formats

TRADITIONAL MEETING/LUNCH AND LEARN:
1. Welcome employees and thank them for attending
2. Ask senior management to provide brief overview of company involvement with United Way
3. Introduce UW staff and/or Agency Speaker — speeches, story, videos
4. Ask everyone to give
5. Address questions, make closing remarks, thank everyone again

INFORMATIONAL MEETING:
Festival/fair where employees can mingle and learn more about UW services and get information on how to pledge and volunteer

SAMPLE AGENDA

Welcome & Endorsement
ECM/CEO
5 min

Success Story or Agency Speaker
Agency Speaker
10 min

United Way Overview
UW Staff
10 min

Campaign Video
5 min

Questions and Answers & Thank You
ECM/UW Staff
5 min
WHAT MEETING FORMAT WORKS BEST FOR YOUR SIZE COMPANY?


HAVE YOU FOUND THAT MORE THAN ONE MEETING WORKS BEST?


WHAT CREATIVE WAYS HAVE YOU USED TO PROMOTE MEETINGS TO INCREASE ATTENDANCE?


WHAT IS ONE GOOD THING ABOUT YOUR MEETINGS AND ONE THING YOU CAN IMPROVE?


WHAT MATERIALS WILL YOU USE TO PROMOTE YOUR WORKPLACE CAMPAIGN AT YOUR COMPANY?


UNITED WE FIGHT UNITED WE WIN

JOIN THE FIGHT. PLEASE GIVE DURING YOUR WORKPLACE CAMPAIGN.

When you give to United Way, you fight for the needs of everyone. Financial stability, basic needs of poverty, members of our community.

"When I retired from the military, it took me some time to adjust to my life back at home. I'm so thankful for the help I've received. I couldn't have done it alone."

-Charlie, helped by United Way's Mission United
Ideas & Incentives

1. Take a team, department or company photo in front of your office or company sign. Share on social media using #[CompanyName]United2019 #JoinTheFight and tag @unitedwayswpa
2. Hold a drawing for everyone who donates. Consider incentives such as prime parking, early leave, casual day, day off, gift cards, lunch, or a volunteer service day
3. Create teams for office Olympics — corn hole, kickball, or a ping pong tournament to encourage friendly competition
4. Offer a special prize for those who increase their giving by a set percentage or amount
5. Host food themed events or cooking contests like a chili cook off, potluck, ice cream social
6. Schedule an agency tour for your employees to see their dollars at work
7. Hold fundraising events like a bake sale, office BINGO, holiday grams, or a silent auction
8. Host a volunteer activity for employees to learn how donations make a difference
9. Hold a wrap up party, announce results and say thank you
10. Book/Video Sale—employees donate old books, movies, music to sell
11. Employee Cook Book—Collect and group recipes and put into a customized cookbook. Have children create cover and illustrations. Sell for $10-12
12. UW Carnival —food, games, prizes, UW info table
13. Sweet Treat Cart—leadership brings a cart with donuts and coffee to employees
14. Candy Grams—sell candy and notes to be delivered to employees
15. Mini Massages/Spa Day

WHAT KIND OF SPECIAL EVENTS HAVE YOU HAD SUCCESS WITH?

WHAT HAVE YOU ALWAYS WANTED TO TRY?

NEW IDEAS:
Campaign Checklist

PLANNING
• Meet with your UW Corporate Relations Manager to begin planning your campaign
• Meet with CEO or senior management
• Establish campaign goals: dollar amount and participation percentage

PRE-CAMPAIGN (Up to 6 weeks before campaign)
• Set up UPledge to allow donors to give online to the causes they care most about and see how their contribution is making a difference
• Recruit and train committee to be UW champions
• Establish a timeline for campaign activities (start/end dates, events, etc.)
• Begin campaign promotion by sending a letter from management to employees
• Prepare campaign supplies provided by UW and download supporting materials

CAMPAIGN (1 week to 1 month)
• Conduct a campaign for Leadership givers
• Hold campaign meetings and special fundraising events for all employees
• Distribute pledge forms and email information about online giving
• Send reminder emails to maintain enthusiasm; include updates, success stories, and facts
• Provide learning opportunities through UW staff like agency speakers

POST-CAMPAIGN (1 week)
• Send a reminder that the campaign is closed and forms need to be returned
• Submit copies of forms to payroll, send to UW with your campaign report form
• Pull transaction report from online and give to payroll
• Announce campaign results
• Thank participants and Champions with a celebration event, letter, and email
• Gather feedback and notes for next year, provide info to your UW campaign manager
Campaign Wrap-up

COLLECT PLEDGE FORMS

Notify employees that the information is required by UW to process forms:
1. Name
2. Email or address
3. Employer
4. Total annual gift
5. Form of payment (payroll, credit card, check, etc.)
6. Signature and date

AT THE END OF CAMPAIGN:

1. Compile all pledge forms — make copies for payroll and the employee, submit original to United Way along with your campaign report forms
2. Pull the transaction report from your online pledge site — submit to payroll
3. Contact your UW Corporate Relations Manager to let him/her know that the campaign has closed, forms are mailed, and ask for any final reports
4. Say thank you to your committee and co workers

WAYS TO SAY THANKS:

1. Allow those who pledge to participate in a jeans or casual day
2. Ask the CEO to provide paid time off to volunteer at an agency
3. Hold a company-wide breakfast or lunch
4. Send a thank you letter from your CEO
5. Host a special Leadership recognition reception
6. Offer an office coffee break and thank employees
WE BELIEVE:
• Every child should have a good education so they can have a productive, successful life
• No family should have to struggle to feed their family and keep the lights on
• Every person with a disability should have the opportunity to live with maximum independence
• Older adults have the right to age with dignity in the place they call home

When you join the ranks of United Way of Southwestern Pennsylvania’s workplace partners, you demonstrate a remarkable dedication toward working to address these critical issues.

United Way works with hundreds of community volunteers to investigate, vet and select the highest performing agencies who are best able to help the largest number of people in need. This way, we can ensure your donation is working hard to address issues in our community.

For more information about UWSWPA, visit www.uwswpa.org/learn-about-us

WE CREATE POSITIVE CHANGE TOGETHER

United Way is the business community’s agent for doing good. We work on solving our community’s problems by bringing together the entire community – policymakers, business leaders, high-performing agency partners – to identify long-term solutions that measurably improve lives.

Your United Way donation will support strategies that help people before their problems escalate. We bring together donors, volunteers, corporate and community leaders from across the region to solve problems. We identify the most critical needs in our community and collaborate with the highest performing agency partners who we hold accountable to deliver measurable results.
Let’s Talk About You

WHAT ARE YOUR INTERESTS? WHAT ARE YOU PASSIONATE ABOUT?

CHILDREN & YOUTH?

SENIORS?

HELPING FAMILIES THRIVE?

INDIVIDUALS WITH DISABILITIES?

VOLUNTEER OPTIONS?
Donor Groups

We believe that everyone can be a leader of change. United Way Donor Groups are a great way to promote your employees’ involvement in creating a positive impact on our community.

TOCQUEVILLE SOCIETY

With a Tocqueville Society level gift of $10,000+, you join our region’s leading philanthropists who are working together to address critical community issues and help people in need. As part of this dedicated team, you will forge relationships with like-minded community leaders, participate in family-friendly volunteer opportunities, and receive invitations to exclusive Tocqueville Society social events.

For more information, contact Christie Zenkovich at christie.zenkovich@unitedwayswpa.org or 412-456-6753 or visit uwswpa.org/tocqueville-society.

Take a look at a sample of annual opportunities offered to Tocqueville Society members:
• Quarterly Volunteer Opportunities benefiting Children with Disabilities, Seniors, Financially Struggling Families
• Annual Heinz Awards Reception: December
• Annual Thank You Reception: Spring

WOMEN’S LEADERSHIP COUNCIL

United Way’s Women’s Leadership Council (WLC) is a growing network of women with energy, talent and a passion for making our community better for everyone. The more than 2,000 local women who invested $1,000 or more with United Way last year enjoy exclusive events, connect and network with other women leaders in our community, and participate in hands-on volunteer opportunities.

For more information, contact Lynne Popash at lynne.popash@unitedwayswpa.org or 412-456-6871 or visit uwswpa.org/womens-leadership-council-wlc.

Here are some of the annual opportunities available to WLC members:
• WLC Kickoff Luncheon
• WLC Day of Caring
• Bi-Annual WLC Sew-Ins: December and June

Find tips on engaging women in your workplace in WLC, in our WLC Handbook.
**BRIDGES SOCIETY**

The Bridges Society is comprised of tomorrow’s community leaders and philanthropists; united by a common interest to learn and understand the needs of our community and take a leadership role to impact the future of Pittsburgh. Bridges Society welcomes professionals age 45 and younger and who contribute $1,000 or more annually. As a member, you’ll be invited to unique volunteer events, personal and professional development experiences, and exclusive networking events with other service minded young professionals and local corporate leaders.

For more information, contact Robert at 412-456-6863 or Robert.Jackson@unitedwayswpa.org, or visit uwswpa.org/bridges-society/

- Invitations to WLC and Tocqueville Society networking events
- Exclusive social and volunteering activities

**LINC**

LINC provides access to exclusive social gatherings and unique volunteer opportunities for people under 30 who want to give back to the community. Members make meaningful connections with fellow future leaders all while giving back. LINC is open to donors who contribute $250 or more to United Way Impact Fund or initiatives.

For more information, contact Robert at 412-456-6863 or Robert.Jackson@unitedwayswpa.org, or visit uwswpa.org/linc/

- United Way’s Games for Good (Next Generation Campaign Kickoff): August 8, 2019
- United Way’s Hoodies for the Holidays: Date: TBD
- Special project at United Way’s annual Community Park Improvement

Find tips on engaging your young professionals in United Way’s Next Generation Handbook.
Step-Up to Leadership

United Way offers a special giving option to allow community leaders to “step-up” to Tocqueville Society, Bridges Society or WLC level giving over a period of three to five years. Make a commitment now to incrementally increase your annual United Way gift, building to the full annual gift, and you will be recognized as a member from year one, with full access to all member benefits.

### Tocqueville Society Step-Up Plans

<table>
<thead>
<tr>
<th>Year</th>
<th>3 Year Plan</th>
<th>5 Year Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1</td>
<td>$5,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>Year 2</td>
<td>$7,500</td>
<td>$6,000</td>
</tr>
<tr>
<td>Year 3</td>
<td>$10,000</td>
<td>$7,500</td>
</tr>
<tr>
<td>Year 4</td>
<td></td>
<td>$9,000</td>
</tr>
<tr>
<td>Year 5</td>
<td></td>
<td>$10,000</td>
</tr>
</tbody>
</table>

### WLC & Bridges Society Step-Up Plans

<table>
<thead>
<tr>
<th>Year</th>
<th>3 Year Plan</th>
<th>5 Year Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1</td>
<td>$500</td>
<td>$500</td>
</tr>
<tr>
<td>Year 2</td>
<td>$750</td>
<td>$600</td>
</tr>
<tr>
<td>Year 3</td>
<td>$1,000</td>
<td>$700</td>
</tr>
<tr>
<td>Year 4</td>
<td></td>
<td>$850</td>
</tr>
<tr>
<td>Year 5</td>
<td></td>
<td>$1,000</td>
</tr>
</tbody>
</table>
United Way helps those who want to help.

United Way of Southwestern Pennsylvania connects companies, families and individuals with meaningful volunteer opportunities that help people in need. We’re here to create unique experiences that let more people take an active role in making communities and families stronger. We can rally your employees around important community work. We are even poised to create a custom opportunity that best suits the interests, availabilities and talents of your workforce. We’ll handle the logistics to make participation seamless and rewarding. And because we understand the community’s critical needs and have partnerships with local agencies, we can leverage our relationships to deliver meaningful opportunities for volunteerism.

Below is a sample of volunteer opportunities United Way offers. Please contact Wendy Koch, Director of Volunteer Engagement, wendy.koch@unitedwayswpa.org, to discuss participation in an existing event or customized corporate projects.

**CORPORATE DAYS OF CARING**  
*Design the opportunity that fits your company, working with our volunteer initiatives staff members.*

**Who it Helps:** Children, Financially Struggling Families, Seniors, Veterans, Women  
**Length of Commitment:** 2-8 hours  
**How Employees are Involved:** As a group  
**What is the Time Commitment:** One-time

**BE A MIDDLE SCHOOL MENTOR**  
*Spend an hour per week with a middle schooler and make a difference when they need it most.*

**Who it Helps:** Children  
**Length of Commitment:** 8 months, 1 hour per week  
**How Employees are Involved:** Individually  
**What is the Time Commitment:** Longer-term commitment

**FREE TAX PREP INITIATIVE**  
*Receive training and volunteer to help hard-working, low-income families and individuals prepare their taxes and get the refund they’ve earned.*

**Who it Helps:** Financially Struggling Families, Veterans, Women  
**Length of Commitment:** 4 months  
**How Employees are Involved:** Individually  
**What is the Time Commitment:** Longer-term commitment

**OPEN YOUR HEART TO A SENIOR**  
*Help a senior remain in the homes they love by providing support and friendship.*

**Who it Helps:** Seniors  
**Length of Commitment:** Flexible  
**How Employees are Involved:** Individually  
**What is the Time Commitment:** Long-term, Short-term, One-time

**ADOPT-A-SCHOOL/ COMPANIES IN THE CLASSROOM**  
*“Adopt” a local school to develop a customized program that meets the needs of the students and aligns with your skills and interests. From classroom projects, to mentoring, to organizing field trips, your company can have an intricate role in the lives of local students.*

**Who it Helps:** Children  
**Length of Commitment:** Up to 3 years  
**How Employees are Involved:** As a group  
**What is the Time Commitment:** Longer-term commitment

For more information, contact Wendy Koch at 412-456-6730 or wendy.koch@unitedwayswpa.org. For up-to-date volunteer opportunities, visit uwswpa.org/be-a-volunteer.
HOW MUCH OF MY GIFT ACTUALLY GOES TO SUPPORT SERVICES?
Currently, our administrative and fundraising costs, including staff salaries, represent approximately 12 percent of contributions. This is close to one third of the national recommended standard of 35% cited by the Better Business Bureau’s Wise Giving Alliance.

WHY SHOULDN’T I JUST GIVE DIRECTLY TO MY FAVORITE AGENCY?
United Way does more than raise funds. We work with community leaders to assess and determine the most pressing needs and develop or identify programs and initiatives that can effectively deliver measurable results. United Way monitors agencies who receive funds to ensure they follow sound fiscal policies and provide effective services. Careful stewardship is valuable to donors who want their contribution to make the greatest impact. And, United Way works to not only meet immediate needs but also address the underlying causes of problems for long-term results. It’s also important to note that giving through United Way reduces fundraising efforts for the agencies, so their time and money can be spent helping others.

HOW IS THE MONEY RAISED THROUGH THE CAMPAIGN INVESTED?
Knowledgeable volunteers and experts from our community carefully screen and select the programs funded by your contribution. Their recommendations are reviewed and approved by our volunteer board of directors. After selection, these programs are rigorously monitored to ensure they produce positive, measurable results. Every three years, all of our programs go through an open and competitive review process to ensure that the most effective programs in our community are receiving support.

WHY ISN’T MY FAVORITE AGENCY A PART OF UNITED WAY?
Agencies must address vital needs, meet basic criteria (impact, performance and accountability) and demonstrate measurable outcomes on an ongoing basis to be funded through United Way. Agencies are carefully selected through a rigorous process so we can ensure your dollars are going to the highest performing agencies able to address our community’s most pressing issues.

I HEARD ABOUT SOMEONE WHO NEEDED HELP BUT DIDN’T RECEIVE IT.
Our key areas of focus include: building strong academics and character skills for at-risk children so they can improve their chances for a brighter future; helping financially struggling families gain and maintain financial stability; and supporting seniors and people with disabilities to gain greater independence.

MANY EMPLOYEES HERE ARE LOW PAID.
Every gift to the United Way Impact Fund makes a difference. Payroll deduction makes it easy to give a little each pay period which results in a substantial annual gift. Your gift, no matter the size, is combined with nearly 50,000 other donors to drive real, lasting change in our community. When we all give a little, we can make a big impact!
I DON'T BENEFIT, WHY SHOULD I GIVE?
You may already be benefiting from the services and may not know it; so is your friend, family member or co-worker who may have used the services of a United Way partner agency. But we all share in a better community when a child succeeds in school, when families are financially stable, and when seniors and individuals with disabilities are safe. When you help support United Way, you help build a better life for all of us.

I DON'T WANT MY EMPLOYEES TO FEEL PRESSURED TO GIVE THROUGH PAYROLL DEDUCTION.
A payroll deduction program does not mean pressure on employees. It provides a convenient method for employees to give and receive a tax deduction. We believe that giving is a personal decision. Whether you wish to give and how much you choose is solely your decision. Any amount is greatly appreciated.

ARE ALL UNITED WAYS THE SAME?
No, there are 1,400 community-based United Ways across the country and each is separately incorporated and independently governed by local volunteers. We pay a voluntary membership contribution for the rights to use the United Way name and logo and sup-port broader community impact goals through United Way Worldwide, an umbrella organization. Decisions about community needs and how to address them are made at the local level.

MY SPOUSE GIVES AT WORK. WHY SHOULD I GIVE?
If both you and your spouse decide to give, you will be recognized as a combined giver — possibly making you a Leadership donor and receiving all the benefits and recognition that goes along with that. For example, if you give $500 and your spouse gives $500, you would be recognized as a Leadership donor. You could also be recognized as a Women’s Leadership Council member, and if you are under 45, you could be a Bridges Society members.
I Give Because:

CONTACT INFORMATION
Physical Address:
1250 Penn Avenue
Pittsburgh, PA 15222

Mailing Address:
PO Box 735
Pittsburgh, PA 15230-0735

Main Phone:
(412) 261-6010

My United Way Campaign Manager:

www.uwswpa.org
Facebook United Way Southwest PA
Twitter @unitedwayswpa
Instagram @unitedwayswpa