



# EMPLOYEE ENGAGEMENT CHAMPION HANDBOOK

A guide to making your  
workplace campaign a success.



**CHANGEMAKERS UNITE** 2020-21 CAMPAIGN



United Way of  
Southwestern Pennsylvania

# WELCOME CHAMPION!



Whether this is the first time you've led a workplace campaign or you're a veteran of past campaigns, I can't say it enough ... *Thank you!* I can just imagine how much you are relied on in your organization to "just make it happen." These responsibilities usually fall to the person considered the most dedicated, enthusiastic and professional. You have the trust and gratitude of United Way too, as well as any resources, advice or best practices you need to plan and run a successful workplace campaign.

Now more than ever before, United Way relies on engaged, community-minded organizations like yours and people within those organizations who care enough for those in need to make their campaign a huge success. Thank you for serving as a United Way Employee Engagement Champion and being a ChangeMaker in the lives of so many.

***ChangeMakers Unite!***

**Bobbi Watt Geer**

CEO, United Way of Southwestern Pennsylvania

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# WHY UNITED WAY?



The needs of a community are broad and ever-changing. But no one organization brings together all the essential players to make real change possible like United Way of Southwestern Pennsylvania. Over the past century, we've built a strong network of community leaders, corporations, donors, philanthropists and human-service agencies, marshalling the resources and experience where they can do the most good for the most vulnerable.

During the health and economic crisis of the past year, we were already together as a community. And that allowed United Way to respond in real-time to the unprecedented waves of critical needs.

As our economy continues to recover, United Way needs your support more than ever to help repair lives of those who continue to struggle to meet basic needs.

## REAL PEOPLE. REAL NUMBERS.

142,280

People contacted United Way's 2-1-1 hotline for human services – a 21% increase over the previous year.

250,000

Emergency meals provided to students and their families during just the first 3 months of Covid-19 when school and youth programs were shutdown.

42,618

Seniors and the caregivers served through United for Seniors to help them avoid loneliness, isolation, and help them live independently and safely at home.

5,000+

People with disabilities have been able to pursue greater independence through improved employment and housing opportunities.

## BENEFITS OF PARTNERSHIP



### To You, our EEC

- Professional development
- Opportunity to network with colleagues
- Organizational recognition
- Develop career-building skills
- Personal fulfillment



### To Your Organization

- Create a stronger connection to your community
- Increase employee satisfaction and retention
- Provide individual growth and recognition opportunities
- Build ties to philanthropic and leadership groups



### To Our Community

- Make real change possible in the lives of financially struggling families
- Provide a safeguard and ability to respond during Covid-19 recovery
- An investment in long-term solutions to systemic challenges facing our community
- Help children and youth succeed in school and in life

# THE ROLE OF AN EMPLOYEE ENGAGEMENT CHAMPION



**The Role of an Employee Engagement Champion** United Way Employee Engagement Champions (EECs) serve as leaders within their respective organizations who plan, organize and coordinate workplace campaigns. This role was formerly known as an ECM, but we count on you to do more than simply manage the campaign process. You really are a champion for our mission within your workplace. The job of EEC basically comes down to three key responsibilities:

- 1. Spread the word.** Especially in these difficult times, people are looking for ways to give back to their community. But they're not sure how. This handbook – as well as additional resources – provides compelling language and facts that help tell the United Way story.
- 2. Make the ask.** Sometimes the only missing component to a successful campaign is clearly asking for the pledge. Remind your colleagues that there are no small donations; every dollar does matter and full participation means your organization collectively will make an enormous impact on people's lives.
- 3. Say thanks.** Expressing gratitude carries so much weight in the world. A simple and sincere "Thank You" is not only appreciated, but also leads the way to other volunteer and donation opportunities in the future.



"Our annual United Way campaign has always unified our organization, and given us a chance to connect on a human, empathetic level. For younger staff, and people new to our company, it's a great way to engage them and demonstrate our values and commitment to the community."

—Jackie Ziemianski, Peoples Natural Gas



# WHAT YOUR DOLLARS DO



No matter the amount, every donation to United Way works hard for our community. Remember, the dollars you donate to United Way stay right here in Southwestern Pennsylvania. Here's some examples of the impact various levels of giving can make:



**\$10**  
A WEEK  
FOR ONE YEAR



Provides 130 meals for students and families who might otherwise go hungry

**BIG PICTURE**

The shutdown of school and youth programs during Covid-19 greatly escalated food insecurity in some of the hardest hit neighborhoods.

**\$25**  
A WEEK  
FOR ONE YEAR



Provides 26 days in a shelter, plus case management and support services

**BIG PICTURE**

Job and wage losses due to Covid-19 continue to have a ripple effect, exposing thousands of new families to the possibility of homelessness.

**\$50**  
A WEEK  
FOR ONE YEAR



Provides electricity for six families struggling to pay their bills due to lost wages and jobs.

**BIG PICTURE**

In the first weeks and months of Covid-19, emergency calls to United Way's 2-1-1 hotline increased by 131%. Many calls came from families who never before had to ask for assistance.

# MANY WAYS TO GIVE

We are always looking to make giving to United Way easy for all our donors. That's why we have expanded giving platforms to include these options:

## Continuous Giving

Allows employees to roll over their giving from one year to the next through payroll. With Continuous Giving, scheduled donations continue automatically, and no further action is required unless they choose to opt out. Your Corporate Relations Manager will provide you with a list of prior year payroll donors to be contacted via email. After the deadline, you simply return the final list of employees who did not opt out to your Corporate Relations Manager (purging the list of people who have left the company). The employee's donor designation will continue uninterrupted for the current campaign year.

## Online Pledge Portal

The online portal is the easiest and most secure way for your colleagues to contribute to the causes they most care about. Your Corporate Relations Manager can help you customize a company-specific website which can be accessed through Single Sign-On (SSO) or through a unique, emailable link. Your employees can log on, learn about United Way's work in the community, research eligible agencies, and complete their pledge. They may also enroll in one of United Way's donor groups. The process is completely secure and can accommodate a variety of payment methods, including payroll deduction. An automatic confirmation email will be generated with pledge information for their records.

## Text to Give

This is a simple, secure method of giving that more and more employees prefer. This option makes it easy for people who may not have time or access to complete an electronic or paper pledge.



## VIRTUAL TIP

At times of social distancing, volunteering is still possible. United Way has many ideas for employees who work remotely to be actively involved in making a difference. To learn more contact [Wendy.Koch@unitedwayswpa.org](mailto:Wendy.Koch@unitedwayswpa.org)

## Special Events

Let's put some Fun in the Fundraising. Many organizations have built engaging programs and activities that have become part of their corporate culture that employees really cherish. Perhaps you can raffle off special privileges or prizes (an executive parking space, a VP personal valet for the day). Stage a contest (Iron Chef Chili, Cake Boss Bake-off) to raise money. Another favorite is a raffle for prizes supplied by leadership (wine, rounds of golf, car detailing).

You can download a PDF of more ideas from our online resource guide, and your Corporate Relations Manager would love to brainstorm ideas with you. We've seen it all. And make sure you post pictures on social media.

## Paper Pledge Form

You can request or download traditional paper pledge forms from your United Way representative or go to [uwsdpa.org/speak-united](http://uwsdpa.org/speak-united)

## VOLUNTEER AS A TEAM

Whether you have a team of 2 or 200, United Way offers many opportunities for your employees to volunteer in our community and get personally involved in making change happen. Ask your United Way representative how your organization can volunteer, including:

- Collecting much needed items (school supplies, personal protection equipment, infant and toddler supplies).
- Hosting an on-site project (to assemble activity or hygiene kits, sort supplies)
- Days of Caring within the community (get out and engage in activities such as reading books to local children, or spending time with seniors).
- Skill-specific volunteering (many companies have valuable experience they can share with United Way agencies such as financial budget, coding or conducting mock interviews).

# LEADERSHIP GIVING OPPORTUNITIES



United Way provides several opportunities for leadership giving via our well-established donor groups. They are consistently the guiding force behind our most ambitious and important efforts throughout the year.

## WOMEN'S LEADERSHIP COUNCIL

United Way of Southwestern Pennsylvania benefits from one of the country's largest and most active Women's Leadership Councils. The WLC is a growing network of women passionate about making change possible in our community. Their talent, energy and subject matter expertise create a dynamic force for the cause of issues facing women in our community. In addition, WLC members participate in many networking and social events throughout the year.

*Annual giving level of \$1,000+*

## BRIDGES SOCIETY

Comprised of emerging community leaders and future philanthropists, Bridges Society focuses on understanding and developing long-term solutions for our community. Bridges welcomes professionals age 45 and under to participate in unique volunteer opportunities as well as network with community and c-suite corporate leaders.

*Annual giving level of \$1,000+*

## TOCQUEVILLE SOCIETY

With a gift of more than \$10,000, donors are recognized as our region's elite group of philanthropists, Tocqueville Society. This dedicated group of community-minded leaders receive invitations to exclusive Tocqueville Society events. Together, they work to address critical community issues and lend strategic guidance to long-term initiatives.

*Annual giving level of \$10,000+*



### CHAMPION TIP #1

## FOCUS ON THE IMPACT

Have fun during your campaign, but don't lose sight of the vital importance of every donation. Some ways to keep your colleagues meaningfully engaged include:

- Invite colleagues to a lunch-and-learn that focuses on your United Way campaign.
- United Way can supply a speaker for your workplace who will answer questions and bring to life the enormous impact your campaign can make for our community. Both in-person and video options are available.
- Make use of all the United Way marketing materials provided (posters, videos, flyers) to create multiple impressions and engagement opportunities.
- Emphasize that even a modest donation, combined with thousands of others, can have an enormous impact.

## STEP-UP LEADERSHIP OPTIONS

United Way offers flexible paths to achieving giving levels for affinity group membership. New leadership donors have up to five years to reach full membership level while still accessing membership benefits right away. More information can be found at [uwsdpa.org/lead-the-way](http://uwsdpa.org/lead-the-way)



# RUNNING A WORKPLACE CAMPAIGN



Meet with your United Way Corporate Relations Manager in-person or online to help set up goals and objectives for your campaign. We'll help you be fully prepared to articulate the special needs our community has this year as we continue to recover from Covid-19.

You'll want to identify and meet with a committee of campaign captains within your organization. Their role is to help build enthusiasm and give you feedback on concerns among employees and opportunities to get universal participation.



Once all the pre-launch work has been done, you'll want to hold a campaign kick-off (hopefully in-person, but perhaps virtually). This shared experience gets people excited and makes them feel that they are part of something bigger than just themselves. This is where you'll be distributing materials and identifying campaign captains. Each captain should be responsible for following up with their team to encourage support.

It's important to keep upper management and senior personnel intimately involved in the campaign. Their buy-in and enthusiasm can energize the entire organization and make your job much easier.



## CHAMPION TIP #2

### KEEP MOMENTUM ALL YEAR LONG

Your workplace campaign is the cornerstone of our efforts, but it's important to keep employees engaged throughout the year.

- Encourage colleagues to consider joining United Way's donor affinity groups (page 7). These offer excellent network and professional development opportunities and help create cross-corporation bonds that make our community united.
- Recruit employees to participate in volunteer events throughout the year. These are small 2-3 person volunteer opportunities or large, multi-state efforts.
- Rally support for a specific United Way initiative outside of your annual campaign. Plan a fundraiser in the spring or summer to raise awareness for a cause that speaks to your organization's culture.





# CHECKLIST FOR A SUCCESSFUL CAMPAIGN

## AT LEAST 6 WEEKS BEFORE

- ❑ Meet with your United Way representative to develop campaign goals and strategies
- ❑ Review the previous campaign's performance, determine opportunities and challenges
- ❑ Visit United Way's online campaign toolkit ([uwsdpa.org/running-a-campaign](https://uwsdpa.org/running-a-campaign)) for materials and ideas
- ❑ Meet with your CEO to confirm his or her commitment
- ❑ Recruit and train a campaign team
- ❑ Set dates for employee meetings
- ❑ Develop your specific campaign timeline with dates and goals
- ❑ Review our sample email messages and customize for your campaign

## AT LEAST 4 WEEKS BEFORE

- ❑ Plan your campaign theme and special events
- ❑ Ask your United Way representative about speakers for employee meetings
- ❑ Request materials, including pledge forms and brochures for all employees
- ❑ If you haven't already, begin sending campaign e-communications and announce the campaign Kick-Off Celebration to all employees
- ❑ Conduct a leadership giving campaign – one of the best ways to increase the success of your overall campaign

## AT LEAST 2 WEEKS BEFORE

- ❑ Promote your campaign special events and meetings
- ❑ Send a reminder about the upcoming campaign and special dates to keep in mind

## DURING YOUR CAMPAIGN

- ❑ Make sure every employee receives materials and has an opportunity to give
- ❑ Conduct special events and activities
- ❑ Publicize interim campaign results
- ❑ Send follow-up emails every few days to keep up enthusiasm and build awareness; include community facts and success stories
- ❑ Have fun! Infuse your creativity and build enthusiasm among team members

## AFTER YOUR CAMPAIGN

- ❑ Wrap-up, collect all pledges and follow up on outstanding pledges
- ❑ Calculate results and submit final reports to United Way
- ❑ Announce results to your employees
- ❑ Thank all contributors with a celebratory event, letter or email
- ❑ Debrief with your team and summarize your findings and ideas for next year!



### VIRTUAL TIP

Although once novel, virtual meetings and events are extremely common now. To make your campaign meetings stand out from the dozens of other video calls throughout the week, try starting out with a short personal story or anecdote from the work United Way does in the community. Your corporate relations manager can provide them. Rotate storytelling responsibilities among your campaign team members.

# CHAMPION TIPS

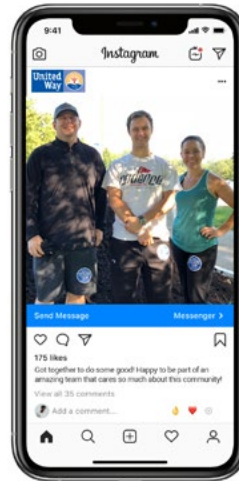


## CHAMPION TIP #3

### CELEBRATE THE FUN

This shouldn't feel like a chore – for you or your colleagues. The most effective workplace campaigns integrate a real sense of enjoyment and fun into the process. Some ideas include:

- Get senior leadership involved. Encourage them to show their personal side and put themselves into the fray. Raffle off the CEO's parking space for a week. Have her take a pie in the face. Be sure he wears the Hawaiian shirt. Be creative.
- Stage an event that will engage younger employees and tap hidden talents. For example, lip-sync battles, goofy sports tournaments or bake-off raffles.
- Some of the best times happen when everyone gets away from their desk for a few hours and volunteers in our community. Your United Way representative can help connect you with the perfect, worthwhile volunteer opportunities to bring smiles to your workplace.



## COMMUNICATIONS & SOCIAL MEDIA

You probably communicate with employees using a variety of channels. Especially in these times of remote working, it's important to utilize a suite of communication tools and platforms. Your United Way Corporate Relations Manager can help you customize an engagement strategy to keep your team connected and on-mission. Suggested tactics include:

- Daily or weekly emails starting with the campaign launch to all employees and special messaging to leadership.
- Personal blurb from leadership for intranet and social network newsletters.
- Utilizing digital signage or assets where appropriate.
- Posters, flyers and other marketing materials
- Custom communications (balloons, t-shirts, guerilla marketing).

## DON'T FORGET OUR HASHTAGS!

@UnitedWaySWPA #ChangeMakersUnite



# ADDITIONAL RESOURCES AND TOOLS



United Way of Southwestern Pennsylvania has prepared a suite of resources and tools for our valued EECs to plan and manage a successful workplace campaign.

## FOR MORE INFORMATION + YOUR TOOLKIT:

[uwsdpa.org/running-a-campaign](http://uwsdpa.org/running-a-campaign)

## LOCAL OFFICES

### Allegheny County Office:

1300 Liberty Avenue  
Pittsburgh, PA 15222  
412-261-6010

### Butler County Office:

407 West Jefferson Street  
Butler, PA 16001  
724-285-4883

### Westmoreland County Office:

1101 Old Salem Road #101  
Greensburg, PA 15601  
724-834-7170


## CONGRATULATIONS AND THANKS

Perhaps the most important part of any workplace campaign are the final two words: **Thank You**. Expressing your gratitude is the best way to reinforce positive behavior and ensure future engagement.

- Consider demonstrating your appreciation with a special wrap-up event such as a pizza party or ice cream social.
- Encourage your CEO to reach out personally to team leaders and new donors.
- Celebrate your fellow employees who went above and beyond during the campaign with a day off or token of your appreciation.

Most of all we want to thank you, our EEC, for everything you do throughout the year to help engage your organization with the values and mission of United Way. You are truly a ChangeMaker we can all be proud of.

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

 United Way of Southwestern Pennsylvania  
Private United Way EEC Facebook Group:  
<https://www.facebook.com/groups/1917759001812993>

 @unitedwaysdpa

 @unitedwaysdpa



# CHANGEMAKERS UNITE



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