



EMPLOYEE ENGAGEMENT CHAMPION HANDBOOK

A guide to making your
workplace campaign a success.



CHANGEMAKERS UNITE 2023-24 CAMPAIGN



United Way of
Southwestern Pennsylvania

WELCOME EMPLOYEE ENGAGEMENT CHAMPION!



Whether this is the first time you've led a workplace campaign or you're a veteran of past campaigns, I can't thank you enough! I can just imagine how much people in your organization rely on you to "just make it happen." Campaign leaders are often among the most dedicated, enthusiastic and professional people on the team. You have the trust and gratitude of United Way, and, in this handbook, the resources, advice or best practices you need to plan and run a successful workplace campaign.

United Way relies on engaged, community minded organizations like yours and people within those organizations who care about those in need to make workplace campaigns successful. 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

Contents

- Welcome Champion!
- Why United Way?
- The Role of an EEC
- What Your Dollars Do
- Many Ways to Give
- Leadership Giving Opportunities
- Running a Workplace Campaign
- Checklist for a Successful Campaign
- Champion Tips
- Additional Resources and Tools



United Way of
Southwestern Pennsylvania

WHY UNITED WAY?

United Way of Southwestern Pennsylvania brings together all the essential players to make real change possible. We've built a strong network of community leaders, corporations, donors, philanthropists and human-service agencies, marshalling the resources and experience to do the most good.

United Way is focused on driving three key objectives outlined here. By promoting equitable opportunity across race, gender and ability and fostering innovative solutions to age-old problems, United Way is creating positive change.



MEETING BASIC NEEDS

Connecting people at times of crisis to essential needs such as emergency shelter, food and assistance with utility bills.



MOVING TOWARD FINANCIAL STABILITY

Providing people with resources to overcome short-term instability and offering practical tools and training to sustain a quality of life for themselves and their families.



BUILDING FOR SUCCESS IN SCHOOL AND LIFE

Helping kids start their educational journey and build foundational skills that will fortify them for school and beyond.

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 for those struggling to meet basic needs and gain financial stability.
- Help children and youth succeed in school and in life.
- Invest in long-term solutions to systemic challenges facing our community.

THE ROLE OF AN EMPLOYEE ENGAGEMENT CHAMPION

United Way Employee Engagement Champions (EECs) serve as leaders within their organizations by planning, organizing and coordinating workplace campaigns. 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 an EEC comes down to four key responsibilities:

- 1. Spread the word.** People are looking for ways to give back to their community, but they're not sure how. This handbook provides compelling language and facts that help tell the United Way story.
- 2. Make the ask.** The key 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. Outreach.** Effective outreach to past donors is an important step in your campaign strategy. So often, we hear from longtime donors who forgot to take action, thought they'd already pledged or that their gift automatically rolled over each year (which in some cases it does not). Work with your United Way representative to develop a plan for outreach leading up to campaign conclusion.
- 4. Say thanks.** Expressing gratitude carries so much weight in the world. A simple and sincere "Thank You" is not only appreciated, but also opens the door to other volunteer and donation opportunities in the future.



"Carnegie Mellon University is proud of our enduring partnership with the United Way of Southwestern Pennsylvania as part of our long-standing institutional commitment to make a positive and lasting impact in our region. Each year, during our campaign, our Pittsburgh campus engages in both virtual and in-person activities and events to raise money and awareness in support of the United Way's vital services and programs. The campaign provides a wonderful opportunity for our Tartan community to come together in service of a great cause."

—Todd Rosignoli, Assistant VP of Learning & Development, Carnegie Mellon University and United Way Committee Chair



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 a food to feed a family of four for an entire weekend.

BIG PICTURE

Nearly one in seven people in Southwestern PA face food insecurity. Many are not eligible for federal nutrition programs and rely on local food pantries.

\$25

A WEEK
FOR ONE YEAR



Provides 5 nights in an emergency shelter, plus accompanying transitional services.

BIG PICTURE

Affordable housing is in short supply. For every 100 low-income families, seniors and people with disabilities, there are only 39 affordable homes for rent.

\$50

A WEEK
FOR ONE YEAR



Provides a family with one-time financial assistance paid directly to the creditor to help with utilities, rent, transportation, food and other basic needs.

BIG PICTURE

United Way's 211 saw a 27% increase overall in utility payment assistance requests.

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:

Online pledge site

The online pledge site is the easiest and most secure way for your colleagues to contribute to the causes they care about most. Your corporate engagement manager can help you customize a company-specific website accessible 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. Colleagues may also enroll in one of United Way's leadership 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.

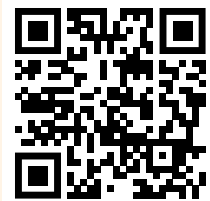
Continuous giving

This 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 the donor opts out. Your corporate engagement 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 engagement manager (purging the list of people who have left the company). The employee's donor designation will continue uninterrupted for the current campaign year.



VIRTUAL TIP

United Way can provide a QR code linked to your pledge site to allow for quick access to giving from mobile devices. Reach out to your United Way representative to learn about this easy step to increase campaign participation.



Retiree engagement program

After decades of dedicated service, retiring from full-time employment doesn't mean disengaging from the community. In fact, just the opposite is true. Statistics show that retirees give a larger portion of their income to philanthropic causes than the average person.

United Way of Southwestern Pennsylvania provides an excellent opportunity for employees entering retirement to stay engaged with your organization and their community. It helps maintain healthy relationships and provides generational inspiration for your current employees.

Paper pledge form

You can request or download traditional paper pledge forms from your United Way representative or go to uwsdpa.org/running-a-campaign.

VOLUNTEER AS A TEAM

Whether you have a team of two or 200, United Way offers many opportunities for your employees to volunteer 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, infant and toddler supplies).
- Hosting an on-site project (to assemble STEM Kits, or weekend food bags).
- Week of Caring within the community (get out and engage in activities such as reading books to local children, or spending time with seniors).
- A Day of Caring is a great way to bring volunteerism into the workspace and boost company morale while making a difference. Our team will bring all supplies to your office. We will start the volunteer project with an engagement activity, so your employees gain a better understanding of how they are impacting the community.



United Way of
Southwestern Pennsylvania

ADD FUN TO YOUR FUNDRAISING EFFORTS



Looking for ideas to spice up your campaign? Here's a list of ideas to get you started. Apply your creativity and tailor your own events to fit your company culture.

Keep your employees engaged regardless of their work space. Look for the symbol below for ideas you can incorporate onsite or online. **ONSITE + ONLINE**

OFFICE FUN

Not every office can manage to fit a dunk tank in next to the water cooler. Let these ideas inspire ways to loosen up your workplace.

ONSITE + ONLINE LEADERSHIP ENGAGEMENT

One-on-one or group time with a senior manager to learn a unique skill/hobby together. Identify the skills/hobbies in-advance and start the bidding. Do these in person or virtually.

CAFFEINE CART

Stock up on coffee, tea and snacks to cart around the office to your staff. It's a fun, convenient way to keep your team energized. (It's also a nice mid-day treat!)

ONSITE + ONLINE LUNCH WITH LEADERSHIP

Pay for employees to have a brown bag lunch with company leadership. Or try "five for \$5" or "\$10 for 10"- employees have an opportunity to meet virtually or in-person with leadership to ask five questions for \$5, or 10 for \$10. This provides employees with professional development and access to company leadership.

PENNY WARS

Get your change ready! Start a Penny Wars competition between two or more groups using pennies, silver coins and dollar bills. Each cent is worth one point, counting to your final total. However, those you're competing against can add other coins and dollar bills to subtract from your total. Those with the most pennies at the end of the competition wins!

WHITE ELEPHANT REVERSE

Each department contributes one item to the White Elephant Sale. Other departments bid on items to be placed in the department of their choice. All dollars benefit your campaign. Departments can choose to keep the items or, if it is something awful, pay to send them to a different department.

ONSITE + ONLINE OFFICE SALE/AUCTION

Take some time to identify items around the office that are no longer needed. Display them in a common space for others to access and purchase. You can get really creative here!

COMPETITION FUN

Award a prize and create a healthy competition in your workplace.

ONSITE + ONLINE BRACKET CHALLENGE

Turn any bracket into a fundraiser for United Way. Popular events include fantasy sports, March Madness, professional sports playoffs and Rock, Paper, Scissors.

ONSITE + ONLINE UNITED WAY CHALLENGE

During the campaign, develop opportunities to earn points towards prizes like a team lunch, half-day PTO or a meal with an executive. Friendly competition across departments can boost participation. Earn points by pledging towards the campaign, increasing their gift, donating to a collection drive, volunteering or attending a campaign event.

ONSITE + ONLINE COMPETITION ACROSS COMPANIES / DEPARTMENTS / LOCATIONS

Do you have a vendor or a competitor also running a workplace giving campaign with United Way? Consider initiating a friendly competition. Most raised? Most participation? Most items collected? The winning company provides the other company with a prize (i.e.: hosted lunch, tickets to a sporting event, etc.).

ONSITE + ONLINE BASKETS FOR AUCTION

Gather each department and create themed baskets for an auction. Basket theme ideas include, backyard BBQ, wine lover, beer lover, activities for the kids, sports fans, movie night, etc.

ONSITE + ONLINE TRIVIA

Create a trivia competition using company, community or United Way facts.

ONSITE + ONLINE BINGO

Everyone loves BINGO, right? Set an amount to purchase and participate per card and get playing! Coordinate as a regularly scheduled activity each week for 15-30 minutes.

Special Event Online Tool

Keep the creative and exciting activities around your campaign efforts going and let United Way's Special Event Online Tool make cash collection easy and efficient. No more having to collect and keep track of cash! This digital tool will also track attendance/participation. Ask your United Way representative for more details!





FITNESS FUN

You don't have to be an athlete to enjoy these physical activities. Gather pledges and invite guests to judge or participate. These events can be built around the kickoff or final celebration.

ONSITE + ONLINE FITNESS CHALLENGE

Log your active minutes over a period of time to garner support for the campaign. The fitness challenge allows individuals to track their activity, submit and win prizes for categories like most steps, most creative fitness activity, group activities, fitness around town, etc.

ATHLETIC TOURNAMENTS

Set up equipment on the company lawn or central public space. Charge an entry fee and offer prizes. Cornhole, softball, golf and mini-golf are a few of our favorites!

ONSITE + ONLINE VIRTUAL 5K

A nominal race entrance fee would be a donation to support your United Way campaign. Participants can run, walk, treadmill, or bike from any location. Complete your own 3.1 mile route, on a day and time that is convenient to you. Use a shared spreadsheet that all participants can log their results. Top finishers could win prizes or tickets for a company raffle. All participants could earn company swag or a t-shirt. *Runsignup.com* is also a good tool for all types of races.

PHOTO FUN

Make no mistake, everybody loves photography. Bring out all of your employee's inner shutterbugs with these photography-based ideas.

ONSITE + ONLINE PHOTOGRAPHER-FOR-A-CAUSE

Nominate your company's best photographer. Take photos of your organization's most photogenic people and places. Then advertise and sell prints, explaining that it's all to raise funds for United Way.

ONSITE + ONLINE PET PICTURE MATCH GAME

Some say people look like their pets. Invite employees to try matching pet pictures to pictures of management. Award an incentive to the entry with the most correct answers. Charge employees a set amount for each ballot. Equally fun is to play with baby photos as well as interesting, little known facts about individual employees.

ONSITE + ONLINE PHOTO GALLERY

Collect pictures of employees engaged at an agency or in a Day of Caring. Get photos of employees participating in a United Way activity or volunteering. Post the photos in a public place.

JUST PLAIN FUN

These ideas are laboratory-tested to create fun. Let these ideas spark a fundraiser to fit your company's culture and needs.

ONSITE + ONLINE WALL OF WINE

Have leadership donate bottles of wine, including a couple of high-value bottles. Bag the wines and display them on a table or on your company's intranet. Employees purchase tickets for \$10 and get to select one of the bottles of wine.

ONSITE + ONLINE COOKING CONTEST

Invite your colleagues to enter a cooking contest. Each employee pays a nominal participation fee, which will benefit your campaign. Identify volunteer judges, feature ingredients and a theme (dessert, appetizer, fancy main course). Host a 30-minute cooking competition in person or virtually. Judges can assign points for presentation, taste or other criteria you determine ahead of time. You could even invite a professional chef to provide a demonstration.

ONSITE + ONLINE ARTWORK CONTEST

Invite employees (and their children/families) to enter drawings of people helping people. Use United Way agency stories to spark the drawings. Post them and vote for the most heartfelt, the best faces, the best use of the color, etc.

ONSITE + ONLINE SPIRIT WEEK

A spirit week has designated theme days all geared around raising spirits and funds for your United Way campaign. Spirit weeks can be handled in a variety of ways; people can pay \$1-\$5 for the ability to wear jeans on a typical workday, or in a virtual world, employees can earn points or raffle tickets by submitting a photo of themselves with the theme item of the day. Spirit Day themes could include, but are not limited to, Pittsburgh sports jerseys, company t-shirt, plaid shirt, company colors, stripes, funny hats, polka dots, concert t-shirts, alma mater sweatshirts, holiday sweater, etc. Each day provides an opportunity for the participant to show their support for giving to the United Way.



United Way of
Southwestern Pennsylvania

For more ideas, contact your United Way corporate engagement manager or visit uwsdpa.org/running-a-campaign.

GIVING AT LEADERSHIP LEVEL AND BEYOND



GIVEUPWARD

THE PATH OF LEADERSHIP GIVING

Your organization is only as strong as its leaders, and the same is true of our community. United Way provides a well-travelled philanthropic pathway for leaders in your organization to make their mark, set the pace for others to succeed and the greatest impact possible on the lives of others.

ANNUAL LEADERSHIP GIVING OPPORTUNITIES*

Tocqueville Society

Ordre de Liberté	\$25,000+
Le Champion	\$15,000 - \$24,999
Membres de la Société	\$10,000 - \$14,999

Leadership Levels

Heinz Level	\$5,000 - \$9,999
Rooney Level	\$2,500 - \$4,999
Keystone Level	\$1,000 - \$2,499

**Gifts can be made over the course of one year, through payroll deduction, multiple payments or one-time gifts.*

Leadership Giving puts your top people at the forefront of making a lasting impact in our community. They will join the ranks of other philanthropic-minded leaders to raise their personal profile as well as your company's.

TOCQUEVILLE SOCIETY

Annual giving of \$10,000 or more

United Way's elite donors receive recognition through the Tocqueville Society, which is comprised of some of our area's most influential business and civic leaders. They help set the agenda for our future and inspire others to follow their example of philanthropy and community involvement. As a Tocqueville Society member, donors will be invited to provide strategic guidance and make funding recommendations for United Way partnerships and initiatives.

BRIDGES SOCIETY

Annual giving of \$1,000 or more

These are the emerging leaders of your organization, age 45 and younger, who are in the prime of their careers. Bridges Society brings together these young professionals and focuses their energy and passion to develop long-term solutions and build the type of community where they want to live. This dynamic and diverse group of philanthropic leaders participates in exclusive volunteer activities, develop leadership skills and network with other like-minded professionals and C-suite business leaders.

WOMEN'S LEADERSHIP COUNCIL

Annual giving of \$1,000 or more

The Women's Leadership Council is the premier organization for women philanthropists in our region. For more than two decades, the WLC has marshalled the giving power of women to positively impact the lives of financially struggling women and families. With more than 2,000 members including corporate, nonprofit and academic leaders, small business owners and philanthropists, United Way's WLC is now the third largest in the nation – and growing every year.

Step-Up Leadership Opportunity. United Way offers step-up plans for donors to access the benefits of these leadership donor groups and have up to five years to reach full membership. More information can be found at uwsdpa.org/get-involved.

Young professionals are laying the groundwork for a stronger, more equitable community. **United Way's Next Gen Ambassador** program recognizes those age 35 and under who demonstrate their commitment through time and financial support that fits their budget. (*Annual giving of \$120 or \$240 or more.*)



United Way of
Southwestern Pennsylvania

RUNNING A WORKPLACE CAMPAIGN

Meet with your United Way corporate engagement manager in-person or virtually to help set up goals and objectives for your campaign. We'll help you be fully prepared to articulate the urgent needs of our community.

You'll want to identify and meet with a committee of campaign ambassadors 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. 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 ambassadors. Each ambassador 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

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. These offer excellent networking 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 can be small-group volunteer opportunities or large, multi-state efforts.
- Rally support for United Way 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 SIX WEEKS BEFORE

- ❑ Meet with your United Way corporate engagement manager 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) for materials and ideas.
- ❑ Create your online pledging site with the United Way team.
- ❑ 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 EEC Messaging Guide and customize for your campaign.

AT LEAST FOUR WEEKS BEFORE

- ❑ Plan your campaign theme and special events.
- ❑ Ask your United Way representative about Impact 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 TWO 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 engagement manager can provide them. Rotate storytelling responsibilities among your campaign team members.



United Way of
Southwestern Pennsylvania

CHAMPION TIPS

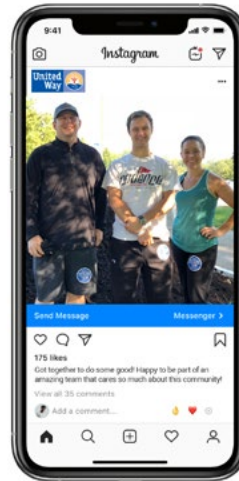


CHAMPION TIP

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. 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 a bake-off.
- 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 engagement manager can help you customize strategies 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 Employee Engagement Champions to plan and manage a successful workplace campaign.

FOR MORE INFORMATION + YOUR TOOLKIT:

uwsdpa.org/running-a-campaign

UNITED WAY OF SOUTHWESTERN PENNSYLVANIA LOCAL OFFICES

Allegheny County Office:

1250 Penn 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

UWSWPA - Customer Service

ecomunity@unitedwaysdpa.org
412-456-6824



www.uwsdpa.org



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



[@unitedwaysdpa](https://twitter.com/unitedwaysdpa)



[@unitedwaysdpa](https://www.instagram.com/unitedwaysdpa)

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 Employee Engagement Champion, 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 for this community.



United Way of
Southwestern Pennsylvania

CHANGEMAKERS UNITE



United Way of
Southwestern Pennsylvania

www.uwswpa.org