



UNITED WAY OF
THE OCOEE REGION

Employee Campaign Coordinator Handbook





CONGRATULATIONS!

You accepted an important role as **Employee Campaign Coordinator**

More than ever, by agreeing to leading your company's workplace campaign, you join a passionate group creating lasting change in our region. Countless children, families, and individuals are experiencing unprecedented challenges. By volunteering your time and talent, you play a vital role in raising awareness about how each person's commitment to contributing to United Way provides a safety net to our community. Together with passionate supporters like you, we are leading the charge to give everyone the opportunity for a better tomorrow.

We hope this guide provides you with the necessary resources to run your employee giving campaign. Please reach out to your United Way representative at any time if you need additional support, guidance, or ideas.

Role of the Employee Campaign Coordinator

The Employee Campaign Coordinator (ECC) plays an important role in creating impact internally and externally. The ECC enables coworkers to build a stronger sense of community by planning, organizing, and coordinating a successful United Way campaign within your company. Kayla Shugart, your United Way representative can help you throughout this process.

UNITED WAY LINGO

ALICE

Asset Limited, Income Constrained, Employed

Those who are working, but one unexpected hardship away from poverty, living paycheck to paycheck

CNIC

Community Needs Identification Committee

A panel of volunteers who compile local data from a variety of sources to determine our community's most pressing needs

FUNDING ALLOCATION PANEL

Groups of donors who volunteer their time to review grant applications to make funding recommendations. Donors decide where United Way dollars go to address local needs and make the biggest impact.

RFP

Request for Proposal

The process by which nonprofit organizations apply for grant funding from United Way. Areas of need are determined by local data compiled by CNIC.

10 CAMPAIGN TIPS FOR SUCCESSFUL ENGAGEMENT

1 SECURE TOP LEVEL LEADERSHIP SUPPORT

Support from top management can make your job easier and your campaign more successful.



2 RECRUIT A TEAM

Having others assist you with the campaign will make it fun and much easier for everyone involved!

3 DEVELOP A CAMPAIGN PLAN

Develop a timeline. The most successful campaigns conclude within two or three weeks after launch. Set achievable, measurable goals and track the results.

4 ORGANIZE A LEADERSHIP GIVING PROGRAM

Leadership gives demonstrate their involvement and commitment with an annual gift of \$1,000 or more.

5 PROMOTE YOUR CAMPAIGN

Educating your colleagues about the value of United Way's work is the best way to gain support for the campaign! Your UW representative can provide you with any materials or assistance you need!

6 KICK OFF YOUR CAMPAIGN

A kick off rally can help infuse some fun into your campaign and help employees understand the importance of participation.



7 MAKING THE ASK

Your knowledge, enthusiasm, and commitment to supporting United Way and sincerely communicating that are key to encouraging employee pledges.

8 BUILD TEAMS THROUGH VOLUNTEERISM

Participate in our annual Day of Action, a funding allocation panel, or let us facilitate a volunteer experience just for your company!

9 WRAPPING UP THE CAMPAIGN

Complete the campaign report envelope and submit to United Way as a summary and record of pledges made. Completed pledge forms and checks should be enclosed in the envelope.

10 CELEBRATE!

Everyone likes to be appreciated and acknowledged for their contribution. Plan a way to say thank you by email or event!

LEADERSHIP GIVING



Leadership giving is designed to encourage and recognize individuals who give more than \$1,000 to the annual community campaign. Conducting a leadership giving campaign is one of the best ways to increase the impact and success of your company's overall campaign. Leadership giving allows your employees to make a meaningful difference and sets your organization apart as a leader in our community.

GAIN CEO LEADERSHIP & SUPPORT:

- Ask the CEO to appoint a well-respected member of senior management who is already giving at the Leadership level to lead your company's Leadership participation
- Engage your CEO and senior management in leading, implementing and executing Leadership giving
- Meet with your management staff to help them understand the importance of Leadership giving

ASK:

- Invite your United Way representative to attend the event and share
- The CEO/Plant Manager/Principal should be present at the Leadership kickoff and ask colleagues for their personal contributions
- Promote Leadership giving throughout your employee campaign

DEVELOP YOUR STRATEGY:

- Develop a plan for meeting with potential donors. Determine what would be most appropriate for your organization.
- Set goals for Leadership giving: increase number of Leadership donors and increase per capita giving
- Make one-on-one requests of current and prospective Leadership donors.
- Secure Leadership gifts early by holding a Leadership drive prior to the company-wide kickoff. This allows company leaders to set the pace for the campaign and lead by example.

THANK ALL LEADERSHIP GIVERS:

- The CEO and Leadership Giving Chair should send a personal thank you to all Leadership givers
- All Leadership donors should be recognized in order to encourage others

LEADERSHIP - \$500 - 999

PILLAR SOCIETY - \$1,000 - 9,999

ALEXIS DE TOCQUEVILLE SOCIETY - \$10,000+



PROMOTE YOUR CAMPAIGN

Creating a big buzz can be fun and easy! United Way can help provide swag and incentives to bolster your campaign! Here are some simple and easy to execute ideas to get you started.

United Way Swag

Let United Way load you up with some swag! Campaign staff, volunteers and other supporters love to wear United Way swag, but don't stop there! You can get creative and dress a statue or mannequin in a t-shirt and put it on display! You can even offer t-shirts as incentives for new or increased givers!

What's your sign?

Display LIVE UNITED or use your company name (<COMPANY> LIVES UNITED) on electronic signboards, marquee, bulletin boards, and other high visibility spots within your building.

Conduct a Contest

Encourage a little friendly competition! See which department can raise the most money or have the most participation!

Incentives

Does your company offer days off for certain giving levels? Have company credit card points that can be used to purchase tickets to Dollywood, etc.?

Dress Down Days

Universally popular, dress down days are a quick and easy way to encourage participation! Employees can wear jeans to work if they give at a certain level (determined by your internal campaign team). Stickers to indicate participation in the dress down day can be provided by United Way.

Document it!

Create videos starring yourself or your colleagues on the subject of Living United. Talk about why you give and encourage others to get involved! Have fun with it! Take pictures and share them to social media or on your internal messaging networks!

Thank You-Gram

Send a LIVE UNITED thank you to any and all people who helped to make plan or execute the campaign!

OPENING

5 minutes; CEO/ECC/ Sr. Leadership

- Welcome
- Value of UW & Company partnership
- Importance of United Way now
- Encourage all to get involved with campaign activities

UNITED WAY AWARENESS ACTIVITY

7-12 minutes; UW Rep/ECC

- Guest speaker from United Way

AND one of these activities

- Walk with ALICE - online poverty simulation
- UW games (Bingo, Jeopardy, etc.)
- UW videos

CLOSING REMARKS

5 minutes; ECC/CEO

- Call to action - Donate now
- Share company fundraising and participation goals
- Share company incentives for donating
- How to give
- Instructions on next steps -pledge form, who to contact with questions, due dates, etc.

OPENING REMARKS

This can be customized to meet the needs of your speaker(s) at your campaign kick-off.

Welcome, everybody!

Thank you all for being here today. Before we begin, I would like to welcome **(introduce UW representative)** from our local United Way.

As many of you know, I am a strong believer and advocate of United Way's work and I am proud to be a part of **<COMPANY'S>** United Way campaign. With nearly a century's worth of experience and guidance, United Way enables people like you and me to make a valuable, lasting impact on the lives of our neighbors and our community.

We all know poverty is hurting our community and this is even more evident since battling a global pandemic. Our most vulnerable community members are even more at risk.

United Way has seen the need for community services skyrocket since the beginning of the crisis. United Way's resource hotline, Ocoee Connect, had calls and needs quadruple in the height of the pandemic - many from people who had never sought out assistance before. United Way was able to respond to those needs, keeping families housed and lights on for over 1,000 families right here in our community.

The issues we have seen first hand over the last year are not new, but have affected people in our community who traditionally don't find themselves in a place of need.

The lasting effects of this pandemic will continue to be felt as people navigate what life looks like in the current climate, and that's why we partner with United Way as they continue to address the needs and find solutions for people and families who need support.

I want to take a moment to recognize and thank each and every one of you who have stepped up to support United Way. Our collective commitment demonstrates **<COMPANY'S>** leadership in our community, raising over **\$XX** for United Way and community needs.

Key point about last year's campaign (your UW representative can help provide information if needed)

If the speaker has a personal story about United Way or something they have experienced, add here.

Thank you again for your personal leadership and generosity in giving to support United Way and what they are doing in our community.

Introduce the next section of the event <UW speaker, event, etc.>

CLOSING REMARKS

This can be customized to meet the needs of your speaker(s) at your campaign kick-off.

Thank you, **<GUEST SPEAKER>** for joining us today and reminding us how important our role is in supporting solutions to our community's needs. You allow us to play such an important role in the lives of our neighbors and the health of our community. The vision to provide the opportunity for a better tomorrow ensures we rise and secures a future where everyone can thrive.

Our annual United Way campaign starts on **<DATE>** and ends on **<DATE>**. We have an amazing team that has worked hard to make this year's campaign even better. Thank you, **<CAMPAIGN VOLUNTEERS>** for your leadership in the campaign!

By now, you should have received a pledge form.* I encourage you to make a gift now and demonstrate our leadership in the community and our commitment to give back. **<COMPANY'S>** donations are part of how we build a stronger community and a stronger, thriving future.

Don't forget that pledge forms are due to **<DESIGNATED PERSON>** by **<DATE>**, and **<REITERATE INCENTIVES>**.

If you have any questions, please reach out to **<DESIGNATED PERSON>**.

Thanks, everyone!

*Customize to fit your company's roll-out for pledge forms.

Just for Fun

UNITED WAY BINGO



Served on a United Way funding allocation panel	Watched a United Way video	Told friends about United Way and its benefits	Sent a note of encouragement to someone going through a difficult time	Shared a United Way post on social media
Encouraged people to support the community through United Way	Toured a United Way partner agency	Volunteered at Day of Action	Participated in a food or clothing drive	Assisted with my company's United Way campaign
Know what AmeriCorps is	Signed up for Imagination Library	FREE SPACE How do you LIVE UNITED?	Referred someone to Ocoee Connect	Attended a campaign presentation
Listened to a United Way podcast	Donated money or items after a tornado	Am a loyal United Way contributor (3+ years of giving)	Been in a United Way video	Own United Way swag
Are signed up for United Way email newsletters	Currently wearing or using United Way swag	Knows what ALICE stands for	Donated furniture or items for Housing United	Volunteered at a United Way partner agency

Just for Fun

UNITED WAY JEOPARDY



Category	100 points	500 points	1,000 points
United Way	<p>What is United Way's tagline?</p> <p><i>Live United</i></p>	<p>How long has United Way been serving the Ocoee Region?</p> <p><i>80+ years</i></p>	<p>What are our community's greatest needs?</p> <p><i>Stable Housing, Access to Healthcare, Access to Quality Childcare, Transportation</i></p>
Read United	<p>What United Way program offers free books to kids 0-5 in Bradley County?</p> <p><i>Imagination Library</i></p>	<p>How many minutes of reading a day is recommended for kids?</p> <p><i>20 minutes</i></p>	<p>What is the name of the local read along Imagination Library podcast?</p> <p><i>Adventures in Reading</i></p>
Housing United	<p>When did Housing United launch?</p> <p><i>2020</i></p>	<p>How long do clients work with a case manager after securing stable housing?</p> <p><i>6 months</i></p>	<p>What percentage of clients remain permanently housed after completing the program?</p> <p><i>88%</i></p>
Ocoee Connect & ALICE	<p>Ocoee Connect helps an average of how many households a month?</p> <p><i>50 households</i></p>	<p>What does ALICE stand for?</p> <p><i>Asset Limited, Income Constrained, Employed</i></p>	<p>What percentage of people in Bradley County are considered ALICE or in poverty?</p> <p><i>41%</i></p>
Volunteer	<p>What is United Way's biggest volunteer event?</p> <p><i>Day of Action</i></p>	<p>What are other ways people can volunteer with United Way?</p> <p><i>Imagination Library, William Hall Rodgers, Funding Allocation Panels</i></p>	<p>On average, how many people volunteer with United Way each year?</p> <p><i>1,000-1,200</i></p>

Just for Fun

HEAD & SHOULDERS CAMPAIGN GAME



Rules

The game is Head and Shoulders. Someone will ask a trivia question. There will be two possible answers. If it is the first one you put your hand on your head. If it is the second one you put your hand on your shoulder. The correct answer will be announced. If you are correct you are still in the game. If you missed it, you are out. We will continue until there is only one person left.

1. United Way of the Ocoee Region (UWOR) serves how many counties?

- 1
- 2

2. Donors decide where their dollars go.

- True
- False

3. What does ALICE stand for?

- A Limited Income Community Establishment
- Asset Limited Income Constrained Employed

4. What percentage of people in Bradley County are considered ALICE or in poverty?

- 22%
- 41%

5. On average, how many households does Ocoee Connect assist per month?

- 23
- 50

6. United Way's biggest volunteer event is called what?

- Day of Action
- Action United

7. Housing United served how many clients in its first year?

- 42
- 80

8. How many kids in Bradley County receive free Imagination Library books every month?

- 2,140
- 3,736

9. United Way uses what to determine our community's greatest needs?

- Instinct
- Data

10. When was our local United Way established?

- 1937
- 1952

11. UWOR work with how many volunteers a year?

- 1,000-1,200
- 500-700

12. What are our community's greatest identified needs?

- Affordable Housing, Childcare, Healthcare, Transportation
- Food, Clothing, Utility Assistance, Housing



MEET THE TEAM

United Way is committed to our community and committed to helping you succeed! Please reach out if you have any needs, questions, or just want to brainstorm new and creative ways to infuse fun into community giving!



Kayla Shugart,
Director of
Development

kaylashugart@unitedwayocoe.org

423-479-2020



Stephanie
Linkous,
President & CEO

stephanielinkous@unitedwayocoe.org

423-479-2020