



EMPLOYEE ENGAGEMENT CHAMPION HANDBOOK

A guide to making your workplace campaign a success.

CHANGEMAKERS UNITE 2022-23 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

Contents

Welcome Champion!	2
Why United Way?	3
The Role of an EEC	4
What Your Dollars Do	5
Many Ways to Give	6
Leadership Giving Opportunities	7
Running a Workplace Campaign	8
Checklist for a Successful Campaign	9
Champion Tips	10
Additional Resources and Tools	11

WHY UNITED WAY?



No one organization brings together all the essential players to make real change possible like United Way of Southwestern Pennsylvania. 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.

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 creates positive change.



MEETING BASIC NEEDS

On any given day, thousands of our neighbors face unexpected challenges that threaten to unravel their lives. United Way helps people access basic needs such as shelter, safety and food to prevent suffering and preserve human dignity.



MOVING TOWARD FINANCIAL STABILITY

Many hard-working people feel overwhelmed by the challenges of providing for their family. They want to do more than just get by; they're looking for an opportunity to get ahead and make a better life for their family. United Way tackles issues that confront people of all abilities to find and access meaningful employment, and gain financial footing.



BUILDING FOR SUCCESS IN SCHOOL AND LIFE

With the right resources and personal support, every child has the chance to succeed. United Way works to level the playing field for communities of color and supports quality out-of-school programs to help children form healthy habits and develop critical learning skills.

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 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 an EEC basically comes down to three 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 – 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.



"PPG is proud to partner with United Way of Southwestern Pennsylvania, as we have for many years, to improve the lives of our friends and neighbors in our local communities. Our annual United Way campaign has grown and developed over the years into our feature philanthropic activity involving hundreds of company employees in a range of fun activities and events. It's a great way for employees to engage with each other in ways that they otherwise would not, and all for a great cause."

—Joel P. Dennison, Chief Compliance Officer, PPG Industries



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

Nearly 1 in 7 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 26 days in a shelter, plus case management and support 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 electricity for six families struggling to pay their bills due to lost wages and jobs.

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 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 Engagement 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. Colleagues may also enroll in one of United Way's donor affinity 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.

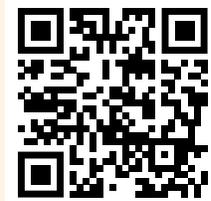
Continuous Giving

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 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 your mobile device. Reach out to your United Way Manager to learn about this easy step to increase campaign participation.



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 auction 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 Engagement 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/running-a-campaign

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 or food packing)
- 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



GIVEUPWARD

THE PATH OF LEADERSHIP GIVING

Your organization is only as strong as its leaders, and the same is true of our community. These are individuals who aspire to make their mark and set the pace for others to succeed. United Way provides a well-travelled philanthropic pathway for leaders in your organization to make 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

United Way's elite donors receive recognition in 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.

Annual giving of \$10,000 or more



BRIDGES SOCIETY

These are the emerging leaders of your organization, 45 years 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 participate in exclusive volunteer activities, develop leadership skills and network with other like-minded professionals and C-suite business leaders.

Annual giving of \$1,000 or more

WOMEN'S LEADERSHIP COUNCIL

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.

Annual giving of \$1,000 or more

STEP-UP LEADERSHIP OPPORTUNITY

United Way offers step-up plans for donors to be eligible to access 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

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 special 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 #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. 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 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 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 (uwwpa.org/running-a-campaign) for materials and ideas
- Create your online pledging site
- 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 engagement 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. 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 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

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

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



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



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



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

CHANGEMAKERS UNITE



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