

UW

ATX

***Employee Campaign
Leaders’
Action Guide***



United Way for Greater Austin

Make a bigger impact

Employee Campaign Leaders (ECLs) are the critical link between United Way for Greater Austin and the employees that help us make Austin greater. In this guide are tips for strengthening your campaigns, getting more employees engaged and, overall, making a lasting impact on our community and your company.

In this guide, you'll find:

- Step-by-step instructions on planning every aspect of campaign, from the logistical to the fun
- Ideas and tips to make Employee Campaign more engaging
- Links to additional resources

We hope you will use this guide as a go-to resource for your campaign needs, but a booklet can only do so much. Your UWATX rep is always available to help with the rest, so please reach out to us.

Your UWATX contact is:

Phone: _____

Email: _____

Table of Contents

<i>About UWATX.....</i>	<i>3</i>
<i>ECL Description.....</i>	<i>4</i>
<i>Best Practices.....</i>	<i>5-14</i>
<i>Campaign Tools.....</i>	<i>16-20</i>
<i>Online Engagement.....</i>	<i>21-22</i>

UNITED WAY FOR GREATER AUSTIN

Our name

UnitedWayAustin.org

Our URL

UWATX.org

Our shortened URL

facebook.com/uwatx

Our Facebook URL

@UWATX

Our Twitter handle

UWATX

Our acronym

OUR VISION

Greater Austin is a resilient, innovative, philanthropic, creative and thriving community for all.

OUR MISSION

We inspire, lead and unite an eclectic community of philanthropists, including individuals, nonprofits businesses and government to overcome barriers to economic opportunities and ensure Greater Austin continues to thrive.

WHAT WE WANT TO COMMUNICATE

- We are committed to changing our community for the better
- We are local
- We have been in Austin since 1924
- We raise money locally and invest it locally
- We help Austin's working poor
- We are results-driven and research-based
- We create opportunities for anyone to be a philanthropist

Employee Campaign Leader Job Description

You're the right fit for the ECL role if....

- You love your job!
- You want to expand your leadership skills.
- You have an energetic force.
- You're a trusted co-worker.
- You embrace your company's culture of philanthropy.
- You inspire others to make an impact in their local community!

Leader: Sets the tone of the team and the campaign itself.

Convener: Brings together the team that builds a successful campaign.

Ambassador: Promotes campaign awareness and education throughout company; ensures that campaign communication complements company values and goals.

Benefits:

- Grow your leadership, project management and public speaking skills.
- Demonstrate your commitment and leadership to others in your company.
- Work with a team of compassionate and talented coworkers from across departments.

Top 10 *Best Practices*

Tips and resources for running a great Employee Campaign

#1 DEFINE INTERNAL ROLES AND RESPONSIBILITIES

Recruit a team!

Don't run your campaign alone. Recruit a committee of enthusiastic, resourceful and committed employees to help you plan the best possible campaign.

- Diversity is important. Involve representatives from various departments in your organization, such as marketing, human resources, payroll, etc.
- Set up regular committee meetings and delegate responsibilities. You can ensure campaign success by creating roles and responsibilities for committee members, such as marketing and events, campaign communication, department liaison, payroll contact, etc.

Our team is: _____

#2 NAIL DOWN LOGISTICS

Determine your timeline.

The most effective campaigns are short and goal-oriented. Keep your campaign within 1-2 weeks. Set specific start and end dates and inform your coworkers.

Starting a campaign with a clear kickoff and wrapping up with a great finish are often an important consideration - think about these things when you decide timing.

Campaign start date: _____

Campaign end date: _____

#3 NAIL DOWN LOGISTICS

Set a challenging, yet attainable goal.

Be ambitious but realistic so your coworkers have an attainable goal to reach.

Assess 2012 data

Employee Giving Total:

Leadership Giving (\$1,000+ annually):

of Employees:

of Donors:

Leadership Givers:

Employee Participation (total # of donors divided by total # of employees):

Previous 3-year giving totals:

2010: \$

2011: \$

2012: \$

Difference year-to-year:

2010 to 2011 %

2011 to 2012 %

Identify potential

Average gift \$ x # of new donors =
TOTAL increased participation:

of new Leadership Givers (\$1,000+ annually)
x \$1,000 = TOTAL leadership increase:

Identify growth

Does your company offer a corporate match for employee donations? If so, what are the guidelines? Does your company offer **sponsorships, grants or other corporate gifts**? You may want to consider these types of questions when working to increase corporate support for United Way for Greater Austin.

Calculate Your 2013 Goal

2012 Total Employee Giving
+ Potential growth bases on new donors
+ Potential growth based on new Leadership Givers
+ Potential company gifts

TOTAL

#4 PLAN YOUR EMPLOYEE CAMPAIGN ACTIVITIES

Rallies!

Hold educational meetings and events throughout your campaign to get employees together, have fun, and learn more about the community needs and how they can get involved. Ensure the event offers employees plenty of ways to learn and understand what their contribution to UWATX is accomplishing. These meetings can be flexible in their design and utilize UWATX's Impact Stories (available in the online toolkit referenced on Page 18) to provide real-life examples of UWATX's work.

Our rallies will be on: _____

#5 *PLAN YOUR EMPLOYEE CAMPAIGN ACTIVITIES*

Volunteer Projects!

Hands On Central Texas, a program of UWATX, provides group volunteer opportunities that promote team building. Visit uwatx.org/handson to search and register for available projects.

*Our volunteer
projects are:*

#6 PLAN YOUR EMPLOYEE CAMPAIGN ACTIVITIES

Leadership Meeting!

Set a meeting designed to educate upper management and organizational leaders about the benefits of giving at the Leadership Giver level (\$1,000+ annually). Visit the online toolkit (referenced on Page 18) for Leadership Giving strategies and information about UWATX's affinity groups.

Our leadership giving meeting is: _____

#7 COMMUNICATE ABOUT YOUR CAMPAIGN WITH EMPLOYEES

Communicate and publicize the campaign.

Campaigns with great visibility encourage everyone to take part in them. Consider using email, intranet sites, personalized letters, pay stub inserts and UWATX materials to promote the campaign.

Hang posters and flyers in prominent places like lobbies, kitchens/lounges, and elevators to announce the UWATX campaign dates and important information.

Make sure you have the following essential UWATX materials:

- Brochures
- Posters
- Pledge Forms
- UWATX Brochure Inserts (Raffle Forms)
- “I Make Austin Greater” Stickers
- UWATX videos
- UWATX giveaways/prizes

#8 SAY THANK YOU

Don't forget to say thanks!

Ensuring your employees have a positive experience is critical to keeping them happy and consistent donors.

- Thank donors, employees and your campaign team in a timely fashion after the end of the campaign.
- Thank contributors for participating in the campaign with incentives such as prize drawings, a thank you luncheon or personal letters.

We plan to say thank you by:

#9 WRAP UP

Finalize your campaign

The steps below outline the appropriate measure for closing out your Employee Campaign.

- Publicize your campaign's end date and ensure all pledge forms are turned in by the deadline.
- Deliver the donations in an envelope to the UWATX office. Be sure to include the top copy of pledge forms and all cash and checks from one-time gifts and special events. You must sign the envelope verifying amount of cash and/or checks enclosed.
- Final results should be submitted to UWATX within two weeks of your Campaign's close. This allows UWATX to process donations and thank your employees in a timely manner.
- Remind donors to keep their copy of the pledge form for tax purposes.

*Results will be turned
in to UWATX by: _____*

#10 STAY IN TOUCH!

Stay in touch with us in person

Your UWATX rep is here to help year-round. Have coffee dates once a quarter to keep UWATX up-to-date on what's going on at your company and to learn how your company's support for UWATX makes Austin greater!



Your Campaign Tools

On the following pages are a list and description of tools to support Employee Campaigns in our region and help make Austin greater. You'll have access to these prior to and during your campaign.

1 The “_____ Makes Austin Greater” badge

Use this creative concept to engage and motivate employees during your campaign. Interested in getting a custom “_____ Makes Austin Greater” piece? Just check in with your UWATX rep and they’ll help you get started!



2

UWATX Online Store

Want some custom and fun products like t-shirts, coffee cups or pens to promote your Employee Campaign? Just visit the UWATX Online Store to see a list of various items for purchase that you can customize for your company!



Product Categories

- View All Products
- Makes Austin Greater
- My Butter Half



Heavy 100% Cotton T-Shirt - YOUTH
Minimum Order: 48
Cost: \$5.76 - \$5.76



Montego 21 oz Sports Bottle
Minimum Order: 150
Cost: \$1.50



Perka 17 oz Insulated Mug
Minimum Order: 96
Cost: \$3.42



Polypro Non-Woven Big Grocery Recyclable Tote
Minimum Order: 288
Cost: \$1.20



Rally 22 oz Stadium Cup
Minimum Order: 500
Cost: \$0.59



Square Jar Opener
Minimum Order: 350
Cost: \$0.58



Canvas Tote
Minimum Order: 150
Cost: \$4.45



Custom Magnet
Minimum Order: 1000
Cost: \$0.36

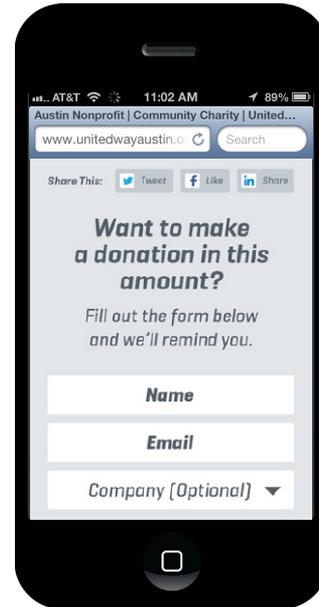
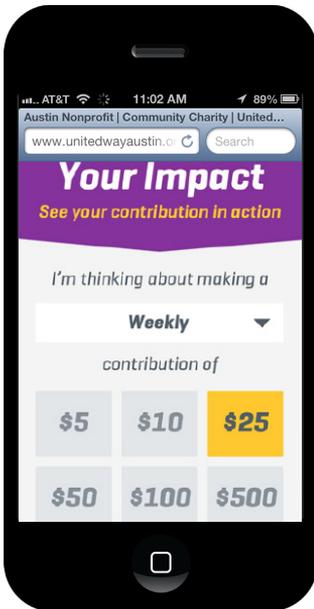


Square Coasters
Minimum Order: 75
Cost: \$3.73

uwatx.org/store

3 UWATX Impact Calculator

As a results-driven and research-based organization, we know the value that every gift has and the impact each donation can make for our community. View our Impact Calculator at uwatx.org/impact to see the difference your weekly donation is making in our community.



4 Campaign in a Box

UWATX provides all ECLs with an online toolkit called “Campaign in a Box.” This toolkit includes tons of helpful documents such as a United Way 101, assorted email templates and Leadership Giving guides. View these tools at uwatx.org/leaders.

The screenshot shows the website for United Way Greater Austin's Campaign Leaders. The header includes navigation links for Campaign Leaders, Advisors, Social Service Providers, Events, and Contact, along with a search bar and social media icons. The main navigation menu lists 'WHAT WE DO', 'GET INVOLVED', 'GET HELP', and 'WHO WE ARE'. A prominent 'DONATE' button and a 'SIGN UP FOR NEWS' button are visible. The main content area features a 'Campaign In a Box' section with sub-sections: 'The Basics', 'About UWATX', and 'This Year's Campaign'. Below these are 'UWATX Online Store', 'From The Boss', and 'ECL Email Templates'. Further down are 'Image Library', 'Leadership Giving', and 'Meet Your UWATX Rep!'. A right-hand sidebar contains a 'Share Your Story' section, a 'Connect to Peers' section with a LinkedIn group link, and a list of placeholder articles with headlines and 'Read more and get connected' buttons.

Connect to other ECLs + Highlight Your Philanthropy

As an ECL, you are getting employees engaged and motivated to make a difference. It's not an easy task, but luckily you're not alone! Become a part of our LinkedIn community and connect to other ECLs like you!

Ways to connect:

- **List your experience as an ECL on your profile.** You can list three types of volunteer and cause information: causes you care about, organizations you support and your experience.
- **Join our LinkedIn group.** We recently launched a ECL LinkedIn group, allowing you to connect with other ECLs and other peers, share discussions and make professional connects.
- **Follow our company page.** Connect with us on LinkedIn and stay up-to-date on news and other relevant information.

To learn more watch our tutorial, *LinkedIn + Philanthropy: Highlighting how you're giving back on LinkedIn* at uwatx.org/linkedin.



The image is a screenshot of a LinkedIn profile page. At the top, there is a search bar with the text "Search for people, jobs, companies, and more..." and a magnifying glass icon. To the right of the search bar are icons for "Advanced" search, a mail icon, a flag icon, and a profile icon. Below the search bar is a large banner image. The banner features a group of people in a meeting setting. Overlaid on the banner is the text "Philanthropy" in a large, yellow, stylized font, with "MAKES AUSTIN GREATER" in a smaller, white, sans-serif font below it. In the bottom right corner of the banner, there are logos for "United Way" and "United Way for Greater Austin". To the right of the banner is a section titled "How You're Connected". This section displays four profile pictures of people, each with a "1st" degree connection label below it. Below the profile pictures, the following statistics are listed: "12 first-degree connections", "24 second-degree connections", and "71 Employees on LinkedIn". A "See all" link with a right-pointing arrow is located at the bottom right of the "How You're Connected" section.

Tell Your Story!

Do you have an experience with United Way that you'd like to share? Or maybe you have a coworker who benefited from United Way in the past? At UWATX, we know one single story can inspire thousands to give back, unite our community and offer hope.

This year, we're telling stories of individuals who, at one point or another, received services/support from UWATX and now give back in dollars or time - stories like these prove ANYONE can be a philanthropist.

Just complete the form at uwatx.org/mystory to share your story with the Greater Austin community!

Jackie shared her story!

I'm a philanthropist because no one knows the importance of United Way more than me.

I've been through some pretty tough times—when I was 15 years old I went into foster care, then later on I needed help getting through a difficult marriage and I became a single mom who needed child care. It was a lot to handle but I didn't have to do it alone—I got connected to some amazing services that supported me through those tough years. I don't think there's anything more important than quality child care and connecting people to services they desperately need. Now, through my H-E-B Employee Campaign, I give back to my community. I once struggled—now I get to help others who are struggling.

MAKES AUSTIN GREATER

- Jackie, H-E-B cashier, UWATX donor and thriving Austinite

And if you're interested in taking it a step further, consider writing a guest post for the UWATX blog about your campaign successes and stories! We'd love to share your achievements with the rest of our community and highlight the great things you're doing! (Contact your UWATX rep for details.)

Share the fun with UWATX online!

If you're posting on Twitter or Facebook about Employee Campaign, we'd love to see it! Showcasing your campaign is a great way to let potential employees or customers know that your company is about giving back and we want to give you kudos!



facebook.com/uwatx



twitter.com/uwatx or [@uwatx](https://twitter.com/uwatx)
[#unitedgiving](https://twitter.com/uwatx)



flickr.com/uwatx

unitedwayaustin.org

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