



EMPLOYEE CAMPAIGN LEADER GUIDE

2023-24



United Way for
Greater Austin

Dear Employee Campaign Leader,

Congratulations on being selected as an Employee Campaign Leader for your 2023-24 United Way campaign! You have an exciting job ahead of you.

Here at United Way, we are breaking the cycle of poverty in our community, and **you play a crucial role**. We know we couldn't do this work without your heroic generosity. This handbook is designed to guide you through a successful workplace campaign.

The United Way team is here to support you in every way: setting goals, planning campaign activities, providing materials, presenting to your staff, and coordinating volunteer activities. Don't hesitate to contact them with any questions that come up along the way.

Keep in mind: a campaign that is fresh and fun makes your job more enjoyable. This is a TEAM effort. Together Everyone Achieves More! So, please join us in our efforts toward building a more equitable community and empowering your team to Live United.

Sincerely,



David C. Smith

David C. Smith, CEO

United Way for Greater Austin



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Employee Campaign Leader Benefits

United Way Employee Campaign Leaders engage coworkers in building a stronger community by planning, organizing, and coordinating a successful United Way campaign.

Benefits include:

- Career-building skills
- Networking opportunities
- Recognition within your organization
- Expert knowledge of the value of giving to United Way

In your Employee Campaign Leader role, you will:

- Work closely with your organization's leadership
- Work closely with your Loaned Executive
- Develop an effective campaign plan
- Recruit a team of volunteers to assist you
- Hold campaign kickoff and recognition events
- Promote the campaign throughout your organization
- Encourage leadership giving in your campaign
- Make your campaign fun
- Thank your donors and volunteers

Key Dates

Disaster Response Training
July 18 or 20, 2023

Fall Day of Caring
October 2023

Feast of Sharing
November 21, 2023

Centennial Celebration
2024

MLK Jr. Day of Service
January 2024

A Night United
March 2, 2024

Gathering for Good
May 2, 2024

OUR MISSION

United Way for Greater Austin is breaking the cycle of poverty in our community.



Local pre-K child enjoying play time at United Way community partner Trinity Child Development Center.

United in building opportunity

Breaking the cycle of poverty is a mission we know well. We take a strategic and evidence-based view of how we lead in the community, invest in nonprofit partners, and run our proven programs.

Together with people like you, we break a generations-long cycle of poverty with impact today and tomorrow.

Building opportunities that meet education, health, and financial stability needs across the counties we serve will unlock the potential of Central Texans for generations to come.

All of our work – from leading community coalitions, to funding nonprofit partners, to running proven programs – is aligned to achieve these goals.

Grow UNITED

All children enter Kindergarten happy, healthy, and prepared to succeed in school and beyond

Learn UNITED

Children are reading on grade level by the 4th grade, a critical time when children transition from “learning to read” to “reading to learn”

Connect UNITED

People in our community are connected to resources for food, health, housing, transportation, and more

Advance UNITED

Families with young children are financially stable

Employee Campaign Leader Job Description and Checklist

As a United Way Employee Campaign Leader, you gain a variety of valuable skills that can be applied to more leadership opportunities in your company. Showcase these skills by adding your Employee Campaign Leader role to your resume and LinkedIn profile.

Sample job description for your resume:

United Way for Greater Austin

- {Start Date} - Present
- Create opportunities for {YOUR COMPANY'S NAME} team members to work together to improve the health, education, and financial stability of every person in our community
- Listen to the needs, interests, and passions of my coworkers and strategically connect them with United Way's work
- Secure philanthropic support for United Way for Greater Austin's mission
- Coordinate employee giving campaign goals, activities, and reporting

Plan Your Campaign

- Attend Employee Campaign Leader training
- Meet with your CEO to confirm their commitment to the campaign
- Meet with your Loaned Executive to develop campaign goals, strategies, & timeline
- Review the previous campaign's performance, determine opportunities & challenges
- Visit the online toolkit for campaign materials & ideas
- Set dates for employee meetings & agency tours
- Request materials & speakers through your Loaned Executive
- Send communications from the CEO endorsing & announcing the campaign
- Connect with a donor network committee member at your workplace (if applicable)
- Invite retirees to your kickoff event
- Promote your campaign special events & meetings

Start Your Campaign

- Hold kickoff event with Loaned Executive & agency speaker
- Hold a leadership giving, retiree, &/or loyal contributor event
- Acknowledge your loyal contributors (10+ year donors)
- Launch special events & activities
- Make sure every employee receives materials & has an opportunity to give
- Publicize interim campaign results

Finalize Your Campaign

- Collect pledges, calculate results, & submit final report envelopes to United Way
- Review campaign results with your team & Loaned Executive
- Announce results to all employees
- Thank all contributors with a celebration event, letter, or email from your CEO or a visit from a United Way representative

Employee Campaign Leader Responsibilities



1. PLAN

Start early. Work with your United Way Account Manager to brainstorm ideas and plan events to engage your employees in the campaign. Think through some incentives your team would like specifically. (More ideas on this in the appendix.) Set a goal and share that goal with your team!

2. MOTIVATE

Communicate the need in our community and the work of United Way with your employees by sharing United Way materials. You're serving as a brand ambassador, so be sure to share why you got involved and why you personally give!

3. ASK

Encourage everyone to participate. Make sure people know that their donation is crucial. Those who do not give often say it was because they weren't asked. Don't be afraid to ask!

4. PROCESS

Collect completed pledge forms as you receive them, as well as any special event money given during the campaign.

5. RECOGNIZE

Take time to thank your team for their generosity and hard work!

Plan and Motivate



Enthusiasm and passion are key. If you're invested, your team will be invested. Be sure to lean on your United Way team members for support.

Employee testimonials are very impactful. Utilize employees willing to share their personal stories of being impacted by United Way's services or volunteer opportunities!

Pre-campaign checklist

- Meet with your United Way Account Manager
- Secure senior management support
- Schedule your kick-off, guest speakers, volunteer projects, and educational and special events
- Review history, select campaign dates, and set goals
- Select participation incentives
- Recruit a campaign committee

Consistent communication

- Promote the kick-off and other events through multiple channels: group presentations, a letter from your CEO, posters, employee testimonials, email, Slack, company newsletter, intranet, lunchroom table tents, and more
- Check in regularly with your United Way Account Manager
- Send regular progress updates to employees
- Hold a mid-campaign committee meeting to review progress towards your goal
- Send reminders about campaign events, incentives, and deadlines
- Promote incentives or matching corporate gifts

Focus on the why

- Share success stories
- Show campaign video
- Offer United Way speakers
- Host awareness events
- Encourage employee testimonials of why they give

Make it fun

- Invite competition among departments
- Involve senior management
- Incorporate team-building events
- Personalize a company campaign video
- Volunteer



United Way for
Greater Austin

United Way for Greater Austin brings people, ideas, and resources together to fight poverty in our community.
unitedwayaustin.org @unitedwayATX

ASK



Your job as an Employee Campaign Leader is to make it as easy as possible for your employees to give. Start at the top—ask company leadership to set the example by making contributions early. Then, ensure every employee has the opportunity to give. Asking for donations is the most important step of your employee campaign.

When donors give directly to United Way, their dollars make the biggest impact in the Greater Austin community. The easiest and most effective gift is a payroll pledge. Donors can also give through cash, check, credit card, or stock depending on the logistics of your campaign. Be sure to let the donor know how to make their gift.

4 TIPS FOR A SUCCESSFUL ASK

1. MAKE IT PERSONAL

You'll want the donor's undivided attention. When possible, visit the donor in person and begin by asking questions to get to know them if you don't already.

3. MAKE THE ASK

Ask for a first-time gift or increase on a previous year; remember that you're not asking for you, but for local children and families.

2. SHARE YOUR STORY

Share what United Way does, and explain why you support us. Discuss your experience or involvement with United Way in the past whether it be through volunteerism, donor networks, or if United Way has helped you personally.

4. SAY THANK YOU

Regardless of what your coworker decides, thank them for their time.

After you ask, follow up with individuals who have yet to submit their pledge form.

PROCESS & RECOGNIZE



WRAPPING UP YOUR CAMPAIGN

The list below walks you through the steps of wrapping up your campaign.

- Collect all pledges and gift information
 - If used, review paper pledge forms for correct completion
 - Ensure that United Way will be provided donor details for acknowledgement purposes
- Coordinate with your United Way Account Manager to review results
- Secure any corporate contributions or matches on employee giving
- Send a thank you letter to the campaign committee and senior leaders
- Report results of the campaign to employees
- Meet with your committee to celebrate successes and identify opportunities for improvement

Utilizing well-timed, visible recognition opportunities for all of your donors and volunteers is necessary to ensure a successful campaign.

BEST IDEAS FOR RECOGNIZING DONORS

- Place campaign thank you posters around your workplace
- Send thank yous from you, your campaign committee, CEO, or company leadership
- Highlight givers of a certain level in a public space
- Host an event for donors who give at a certain level
- Give a special gift or host a reception for your campaign committee
- Publicize results via your company newsletter, email, or intranet
- Celebrate your success

RESTART THE PROCESS!



PLAN FOR NEXT YEAR'S CAMPAIGN

Getting an early start on next year's campaign allows you the opportunity to execute an even more successful campaign.

GET A HEAD START

- Gather feedback from senior leadership, your campaign committee, and the United Way team
- Leave notes and resources for the Employee Campaign Leader to use next year
- Identify next year's Employee Campaign Leader and have them plan to attend future trainings
- Implement a new hire program to give new employees the opportunity to contribute

STAY ENGAGED ALL YEAR

At United Way, we know that people are more likely to donate when they see the impact of their gifts. That's why we hope to stay engaged with your employees throughout the year. Check out the tips below to see how you can use your workplace giving campaign as a way to highlight your company's year-round relationship with us.

- Participate in our biannual Days of Caring
- Sponsor our A Night United and/or Gathering for Good events
- Sponsor and attend our MLK Jr. Day of Service
- Connect with fellow community leaders at a donor network event
- Stay in touch with your United Way Account Manager

MODEL CAMPAIGNS



H-E-B AND UNITED WAY

H-E-B and United Way for Greater Austin have a long-standing and fruitful partnership. H-E-B has over 18,000 employees at locations across Travis & Williamson counties.

Highlights:

- Their campaign has a culture of asking Partners to make their gift at in-person meetings.
- These in-person meetings provide an opportunity for United Way speakers to attend, and ensure every employee is asked.
- Their leadership is actively engaged, and many serve as United Way Board and committee members!



Helping Here.

TEXAS MUTUAL AND UNITED WAY

Texas Mutual Insurance Company runs an amazing campaign from start to finish!

Highlights:

- The campaign is led by an internal committee with representation from each division.
- The leadership is actively engaged, with the President and CEO sharing a personal letter encouraging donors to make gifts via the United Way ePledge site.
- They keep the campaign fun via multiple events, interdepartmental competition, and incentives like gift cards.
- They thank their largest donors with a happy hour following the campaign.
- They keep their team engaged with United Way throughout the year via volunteer projects and sponsorships for key United Way events.



Give United, Live United

Join a Donor Network.

Donor networks connect people who are passionate about doing good in our community.

You'll be part of a community of like-minded leaders making an impact through philanthropy, volunteerism, and advocacy. Members also gain access to exclusive donor network events, all created for and crafted by your network.

Visit unitedwayaustin.org/donor-networks or scan the QR code to learn more and join.



DONOR NETWORKS

Emerging Leaders

Aspiring philanthropists learning, leading, and networking as ambassadors for United Way and changemakers in Central Texas. **Join by donating \$250 (\$21/month) or more annually.**

Leaders United

Community leaders building opportunity for local children and families. **Join by donating \$1,000 (\$83/month) or more annually.**

Women United

A vibrant and powerful women-driven philanthropic force supporting United Way's mission to break the cycle of poverty across Central Texas. **Join by donating \$1,200 (\$100/month) or more annually.**

Tocqueville United

A group of local philanthropic leaders passionate about tackling the most pressing challenges in Greater Austin. **Join by donating \$10,000 (\$833/month) or more annually.**

To learn more, please contact:

giving@uwatx.org



United Way



United Way for Greater Austin

United Way for Greater Austin brings people, ideas, and resources together to fight poverty in our community.

unitedwayaustin.org @unitedwayATX

VOLUNTEERISM



Volunteering is a great way for your team to directly impact our community, while growing closer as coworkers and networking with other service-minded professionals in the area. Your team has a variety of options when it comes to volunteering.

SAMPLE VOLUNTEERISM PROJECTS

- Complete beautification projects at child care centers
- Create kits to promote play and learning for children
- Assemble kits to provide basic supplies for individuals experiencing poverty
- Serve on a committee or alliance to further advocate for our mission

COMMUNITY-WIDE VOLUNTEER OPPORTUNITIES

United Way for Greater Austin offers volunteer opportunities through our community partners and through our Summer and Fall Days of Caring. On these days, neighbors from all over the region come together to impact change. Your company may reserve volunteer and branding opportunities by sponsoring one of these events.

- Disaster Response Training (July 18 or 20, 2023)
- Fall Day of Caring (October 2023)
- Feast of Sharing (November 2023)
- Centennial Celebration (2024)
- MLK Jr. Day of Service (January 2024)
- A Night United (March 2, 2024)
- Gathering for Good (May 2, 2024)



FAQ



GENERAL

What counties does United Way for Greater Austin serve?

In January 2022, United Way for Greater Austin and United Way of Williamson County joined forces and merged! This merger expanded United Way's mission and impact with a regional approach, and helps us better and more efficiently serve a broader community across Greater Austin and Williamson County. In short, it means more people right here in our community will get the help they need.

Collectively, we serve the 10-county region of Bastrop, Blanco, Burnet, Caldwell, Fayette, Hays, Lee, Llano, Travis, and Williamson counties.

I support several organizations. What does United Way do that other organizations don't do?

United Way for Greater Austin drives impact by partnering with and investing in efforts to address the immediate needs of local families in poverty, while also spurring systems-level change, shaping our metro area into a community that works for everyone.

To know what is working and having a real impact in our Greater Austin community, we track impact data. When we share what we know – and what we learn – with the community, we provide our partners with powerful tools. That's why we gather, analyze, and report out critical data about needs and trends here in Greater Austin.

United Way also offers the convenience of payroll deduction through the support of local employers, allowing employees to give a substantial annual gift through small weekly contributions. You can also give online through our website.

FAQ



WORKPLACE CAMPAIGNS & CONTRIBUTIONS

How long should our workplace campaign run?

The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources and run the risk of “donor fatigue.” One to two weeks is usually sufficient to kick off your campaign, get the message out effectively, and make your ask without overburdening staff. Talk with your United Way Account Manager to determine the best approach for your company.

When should our workplace campaign take place?

Most campaigns take place between July and November, but they can happen at a time that is best suited to your organization.

Are donations to United Way tax deductible?

Yes. For charitable contributions made by payroll deduction, the donor may use one of the following documents as written communication from United Way: a pay stub, W-2, or other document furnished by the employer that indicates the amount withheld during the tax year for payment to United Way, and a pledge card or other document prepared by, or at the direction of, United Way that shows the United Way name, the date of the pledge, and the amount of the pledge.

The year when the contribution is deducted from the employee’s paycheck is the tax year in which the employee may claim the tax deduction. For additional information, please visit unitedwayaustin.org/financials.

When does payroll deduction start?

Payroll deduction usually runs from January 1 through December 31, but ultimately this is a decision made by your company. Whatever your decision, be sure to let both United Way and your employees know your schedule and number of pay periods.

FAQ



WORKPLACE CAMPAIGNS & CONTRIBUTIONS

How can I work my Employee Campaign Leader duties into my busy schedule?

The best way is to recruit a committee, assign tasks, and start planning early. And remember, your United Way team is here to help and has tons of resources available to you – no need to reinvent the wheel.

How much of my donation goes toward programs?

87% of every dollar goes to programs. 100% of every dollar goes to our mission of fighting poverty.

Why should I give to United Way rather than directly to an agency?

If you have a personal connection to an agency, United Way makes it easy to give to that agency through your employee giving campaign. And when you invest in United Way for Greater Austin, you are allowing us to use our data-driven expertise on community needs to fund the areas that need it the most.

Donating to United Way stretches your donation the furthest, ensuring that each dollar you give creates the most effective, efficient, and sustainable change for children and families. Donors also have the option to select from funds that align with our focus areas in fighting poverty: education, health, and financial stability.

Can someone make an ePledge gift to a nonprofit that isn't a United Way partner?

Yes, employees can designate their donation to a nonprofit of their choice for a one-time donation of at least \$250.

United Way does allow designated gifts to non-partner organizations with certain restrictions. Please check with your United Way Account Manager for more details.

FAQ



WORKPLACE CAMPAIGNS & CONTRIBUTIONS

What percentage does United Way take for an admin/processing fee when you're serving as a pass-through organization?

When we are both the fundraiser and the processor, 12.12% – with a cap of a \$250 max fee. This fee covers the administration costs of collecting and distributing gifts to other nonprofits. (This is the case 95% of the time. The only exception is for out-of-area Texas Mutual and Emerson employees, we only charge the processing fee.)

Breakdown of the 12.12%:

Processing: 3.06%, with a cap of \$63.12

Fundraising: 9.06%, with a cap of \$186.88

Our employees are low-paid; I don't want to ask them to give.

Every dollar counts at United Way for Greater Austin. No matter what level you're able to give at, your donation will help us continue our work in this community. Collective impact is a crucial component of our mission.

Here at United Way, we want to make philanthropy accessible for everyone in our community. Many times, individuals who have experienced poverty or who have utilized United Way's services better understand the importance of giving back.

I can't afford to give to United Way.

If you're unable to give dollars at this time, consider other ways to get connected with our work. We have opportunities for advocacy, volunteerism, and more.

FAQ



COMMUNITY PARTNERS

How can I get help today?

Dial 2-1-1 to reach our helpline. Your call is strictly confidential.

I know someone who couldn't get help from 2-1-1. Why?

United Way for Greater Austin's Navigation Center strives to keep updated and accurate information for the more than 950 agencies that are listed within the 2-1-1 database. 2-1-1 does not provide direct services; 2-1-1 provides a list of resources that are likely to provide services based on the demographic information a caller provides (zip code, age, Veteran status, etc.). Navigation Specialists will provide callers with program contact, application, eligibility, and intake information but they do not screen callers to ensure they meet all criteria.

Information can change rapidly, especially during times of disaster (storms, pandemics, fires, floods, etc.) or extreme economic shifts. While United Way's Community Information team consistently scours news sources and researches leads for new or changed information, there are many cases where it may take 1-3 days to verify or update changes in information with the agencies.

If you know someone seeking help, continue to direct the individual to call 2-1-1. This free, confidential service is available 24 hours a day, 7 days a week.

FAQ



ADMINISTRATION

Can you speak to your CEO's salary?

To attract qualified candidates for the CEO position, the salary range is informed by market trends for comparable nonprofits and United Ways. Because we are a 501(c)(3) organization, our CEO's salary is publicly available. Our current CEO David C. Smith is generously giving back to the organization at the Tocqueville United level.

If you'd like further information on how donor dollars are used to address poverty in this region, please review our [2022 Impact Report](#).

Where does the money come from to pay for the special events held during the United Way campaign?

Meals and tickets to special events are paid by individuals or corporations in attendance. In addition, sponsors underwrite events to help offset costs.

How is our United Way connected to United Way in other cities?

United Way for Greater Austin is independent and self-governing. The money you contribute stays local to help residents here in Central Texas. We are not connected to other United Ways except through "best practices" sharing with United Way Worldwide in Alexandria, Virginia. Our local Board of Directors oversees our strategy and finances and assumes responsibility for the integrity and stewardship of our operations.

CREATIVE IDEAS FOR CAMPAIGNS



Virtual happy hours: Host a happy hour for employees. Deliver or have employees pick up cocktails/mocktails to-go from a local restaurant. Then, have everyone log on to the video call and play some virtual games like [Kahoot!](#)

PowerPoint party: Prep employees in advance to have everyone show off their amazing knowledge with a short PowerPoint presentation on any subject. Deliver refreshments from local restaurants.

Fun delivery for employees: Get employees excited about your giving campaign by sending participants a thank you gift or delivering some fun to their door. Send candygrams, ice cream, cocktails, or goodie bags/boxes to make their day!
Wellness initiative: Create a health and wellness initiative—the team or individual that gets the highest step count wins. Free smartphone apps are available to help participants track their progress.

Lunchtime meal delivery: Sponsor a lunch and charge a flat fee for all you can eat, enough to cover expenses, delivery, and a small donation. Have employees come by the office to pick up or enlist volunteers to help deliver!

Email Bingo/trivia: Send out daily fun facts about the campaign, company, Central Texas, or your coworkers. Teams or individuals email the answers for points.

Dinner for a week: Select gift cards via email from seven restaurants who have donated a dinner for two. Sell raffle tickets for around \$30 each and select one lucky winner!

Competition between companies: Do you have a vendor or friendly competitor that also runs a workplace giving campaign? Consider doing a friendly competition between companies. The winning company has to provide the other company with a prize (e.g. free lunch).

Mobile food sales: Host a coffee cart or ice cream truck in a common area. A portion of sales can support United Way.

Lunch with leadership: Offer employees a lunch or a mentoring session with top executives. The department with the highest participation gets to attend a lunch or dinner hosted by all senior leadership. Lunch could also be for those that give an annual gift of \$1,000 or more.

Lunch and learns: Order out or brown bag lunches for an educational opportunity. Employees can learn more about local nonprofits and community issues virtually or in person.

Raffle for executive parking spot: Prime parking spots can be a big perk during the cold winter months or in a large facility! Sell raffle tickets or auction off prime spots to raise funds for the community.

Point system competition: During the campaign, develop a point system to encourage participation and friendly competition between departments. For example:

- 6 points for giving during the campaign
- 4 points for increasing gift from last year
- 3 points for donating to the food drive
- 2 points for volunteering during the campaign
- 1 point for attending a campaign event

The team that wins the most points will earn a team lunch, half day of PTO, week of jeans/casual days, etc.

Useful tools:

- [32 Auctions](#): Free online auction website
- [Kahoot.It](#): Free online multiuser trivia game
- [Count.It](#): Free online step count challenge

THANK YOU FOR VOLUNTEERING YOUR TIME AS AN EMPLOYEE CAMPAIGN LEADER!



STAY CONNECTED



United Way for Greater Austin