DEAR EMPLOYEE CAMPAIGN MANAGER,

Thank you for agreeing to lead your company's United Way of Tarrant County Campaign activities! As an Employee Campaign Manager (ECM), you play a crucial role in helping create lasting change in our communities. You also inspire and educate your co-workers about the benefits of giving and volunteering for the greater good of our community.

Your work and the funds you raise are key to building long-term solutions that enable us to fulfill our mission of solving some of the toughest social issues in Tarrant County. We welcome our challenges and take great pride in improving the lives of those in our community now, and in the future. A prosperous Tarrant County is what motivates us to work collaboratively and as a community. It also reminds us of how much is possible when we are motivated by the possibilities of a bright future.

Your drive, dedication and passion will help grow our network of supporters who help us advance our mission. Thank you again for supporting United Way of Tarrant County as an Employee Campaign Manager. Working together we benefit ALL!

Sincerely,

Dr. Patricia Linares, Former Interim Superintendent & Education Consultant
2019-2020 United Way Campaign Chair

Hadley Woerner, President of the Tarrant Region for Frost Bank
2019-2020 United Way Campaign Co-Chair
Employee Campaign Managers (ECMs), the link between United Way of Tarrant County and the employees of our corporate partners, play a crucial role in the success of Workplace Giving Campaigns. ECMs serve as the point person, who leads internal programs that engage employees, encourage them to give and understand the importance of their donations—to help United Way fulfill its mission of solving Tarrant County’s toughest social challenges.

Serving as an ECM also has professional benefits that allow you to showcase your leadership skills, create deeper connections with your peers and increase your work satisfaction. You also will increase your sense of pride in the community.

In this guide, you will find:

• Step-by-step instructions on planning every aspect of your Campaign, from the logistical to the fun.
• Ideas and tips to make your Campaign more engaging for all employees.
• Links to additional resources to help you plan and execute a successful Campaign.

We hope you use this guide as a go-to resource for your Campaign needs. Also, do not hesitate to contact your United Way of Tarrant County representative at any time if you need help.

YOUR UNITED WAY OF TARRANT COUNTY CONTACT IS:

Office: ____________________________
Cell: ____________________________
Email: ____________________________

FOLLOW US:  uwztarrant  uwztarrant  uwztarrant  United Way of Tarrant County

United Way of Tarrant County has worked to improve the lives of those in our communities since 1922. As a nonprofit leader, we bring together individuals, groups, donors and service providers to help solve some of the toughest social issues affecting Tarrant County. Each year, United Way of Tarrant County helps more than 300,000 people through its resources. United Way of Tarrant County has no fees on donor designations, with 100 percent of the donation going to the selected agency or cause.

VISION
Thriving communities, welcoming neighborhoods and a strong economy across Tarrant County.

MISSION
Provide leadership and harness resources to solve Tarrant County’s toughest social challenges.

VALUES
Integrity
Compassion
Excellence
Transparency
Teamwork

GUIDING PRINCIPLES
Our client is the donor.
Our results tell our story.
Our focus is the community.
Our efforts are collaborative.
Our solutions are equitable.

ANNUAL EMPLOYEE CAMPAIGN

It feels good to be part of the solution. That is why more than 200 companies spread across more than 900 individual worksites in Tarrant County have United Way Campaigns every year, accounting for the majority of the funding we invest in the community.

When you hold a United Way Campaign at your workplace, you are opening convenient avenues for employees and co-workers to make a difference including donating through payroll deductions, participating in special events and volunteering with one of our partner agencies.
ECM ROLES AND RESPONSIBILITIES

WHAT ARE YOUR RESPONSIBILITIES AS AN EMPLOYEE CAMPAIGN MANAGER?

- Become United Way Cheerleader in Chief at your worksite and have fun!
- Become knowledgeable about United Way of Tarrant County and educate your co-workers.
- Schedule a planning meeting with your United Way representative to develop an effective Campaign goal and plan.
- Recruit and coordinate a team of company volunteers to assist you with the Campaign.
- Share your Campaign goal and plan with the CEO or senior executives, getting his or her approval to ensure support for the Campaign.
- Coordinate your company’s kick-off, special fundraising events, recognition events and distribution and collection of Campaign materials and pledge forms.
- Promote the Campaign throughout your organization and allow everyone the opportunity to give.
- Encourage Leadership Giving levels in your Campaign (we have more details about this later in this guidebook).
- Monitor Campaign progress and push routine updates to your team via email, intranet sites, newsletters, display or TV monitors and other communications channels.
- Keep your CEO or senior decision-maker updated on Campaign progress.
- Submit pledge forms and complete final United Way report form.
- Say thank you to everyone at your company for their help and participation.
- Commit to debriefing after the Campaign to identify successes and areas for improvement.
- Feel good about the work you’ve completed to benefit the community!

WHAT ARE YOUR RESPONSIBILITIES AS AN EMPLOYEE CAMPAIGN MANAGER?

- Attend ECM Training.
- Keep this guide and refer to it often.
- Keep your representative on speed-dial.
- Bookmark our website (unitedwaytarrant.org/campaigncentral).
- Follow us on social media for up-to-date information about United Way of Tarrant County.

EDUCATE YOURSELF ABOUT UNITED WAY OF TARRANT COUNTY

The more you know about United Way of Tarrant County and running a Campaign, the more successful you will be promoting your Campaign, communicating the mission of United Way of Tarrant County and leading your team.

- Attend ECM Training.
- Keep this guide and refer to it often.
- Keep your representative on speed-dial.
- Bookmark our website (unitedwaytarrant.org/campaigncentral).
- Follow us on social media for up-to-date information about United Way of Tarrant County.

RECRUIT AND TRAIN YOUR CAMPAIGN COMMITTEE

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, communications, 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.
8

Secure CEO and Executive Support

Securing CEO and executive support is important to the success of your Campaign. Their involvement sets an example for employees and underscores the importance of the Campaign and the company's commitment to Tarrant County. Their participation also adds excitement and momentum to Campaign programs and activities, helping you achieve your financial goal.

Develop a Campaign Goal and Plan

A Campaign goal and plan provides the roadmap for programs and activities and streamlines implementation. We encourage you to include your committee in the goal setting and planning processes. It is important to share tasks so everyone on the committee is contributing and the workload is evenly distributed.

On page 12 of this guide, we provide a worksheet to help you and your committee calculate a challenging, yet attainable goal. And in the following pages, we provide ideas on planning and implementing a great campaign kick-off, promoting and publicizing your campaign, as well as year-round engagement opportunities.

Promote and Publicize Your Campaign Activities

You and your committee can be creative in generating internal publicity and creating excitement and interest. You know your environment the best and what will be most effective for your culture.

Campaigns with great visibility encourage everyone to take part. Consider using email, intranet sites, personalized letters, pay stub inserts and United Way of Tarrant County materials to promote the Campaign.

Hang posters and flyers in prominent places like lobbies, kitchens, lounges and elevators to announce the United Way of Tarrant County Campaign dates and important information.

Secure CEO and Executive Support

Develop a Campaign Goal and Plan

Promote and Publicize Your Campaign Activities

Promote Leadership Giving

Leadership Giving is a great way for employees to not only donate to United Way of Tarrant County, but also become involved in the organization. To encourage participation by employees at the Leadership Giving level, ask your CEO or a senior executive to endorse and lead Leadership Giving efforts. Set a meeting designed to educate upper management and other organizational leaders about the benefits of giving at the Leadership Giving level.

For a donation of $1,000 or more, employees become part of Leadership United. Membership in Leadership United provides exclusive invitations to network and collaborate with like-minded individuals who have a passion for philanthropy. It also provides volunteer opportunities.

Plan and Implement a Great Kick-off Event

A kick-off event is a very successful way to communicate a consistent message to your employees about the needs in the community and services United Way helps provide. Your kick-off event can help generate enthusiasm and support for the Campaign.

Make sure your CEO and senior management can attend and participate.

Kick off the Campaign at an all-staff meeting already on the calendar (this prevents employees from having to attend an additional meeting or rearrange their schedules).

Use the theme LIVE UNITED; educate your peers by showing the United Way video, invite United Way partner agencies as speakers and have your management and labor union representatives endorse the Campaign.

If your company has multiple shifts, make sure to plan a kick-off event for other shifts, too (United Way staff is happy to help – no matter what time of the day!).

You may wish to purchase promotional items such as T-shirts, coffee mugs or other items for distribution at the kick-off event or during your Campaign. Many companies order a few items and distribute through a prize drawing during the event. Please contact your representative for a list of available items and prices.
8 SCHEDULE A DAY FOR VOLUNTEERING

As part of your Campaign activities, host a Day of Caring, a designated volunteer day at your company that allows your employees time to volunteer in the community. Promoting volunteerism boosts staff morale and deepens your employees' philanthropic commitment. United Way of Tarrant County can help facilitate volunteer opportunities throughout the year, including managing all project logistics. For more information and to get connected to volunteer opportunities, visit our website at unitedwaytarrant.org/volunteer.

9 MAKE THE ASK

Do you know why most people don't give? Because they were never asked. Most people are generous and want to give, so ask your employees to give and provide them with information outlining how easy it is to give through their company.

10 WRAP UP THE CAMPAIGN

After your Campaign activities come to a close, the final task is completing the report form. The report form gives United Way of Tarrant County an accurate overview of the money raised during your Campaign and helps us forecast our community allocations.

11 YEAR-ROUND ENGAGEMENT

It is important to keep your employees updated year-round about how their dollars are helping in the community. United Way of Tarrant County can tailor options to support your company’s employee engagement and corporate social responsibility objectives throughout the year:

• On-site Volunteer Activities
• In-kind Donation Drives
• United Way Partner Agency Tours
• Day of Caring
• Become a VITA Volunteer (Volunteer Income Tax Assistance)
• United Way Lunch and Learns

NO FEES

United Way of Tarrant County has no fees on donor designations with 100% of your donation going to the cause or partner organization you choose.

CAMPAIGN WRAP-UP CHECKLIST

☐ Collect all pledge forms.
☐ Separate types of giving (check, credit card, cash, payroll deduction, special events).
☐ Calculate results and complete Campaign report form.
☐ Contact your United Way representative to schedule a time to pick up your Campaign donations.
☐ Please DO NOT seal your Campaign envelope.
☐ Announce results to your employees.
☐ Thank all employees with a celebration event, email or letter.
☐ Thank your Campaign team and Leadership Givers.
☐ Conduct a Campaign debrief with your team and United Way representative and gather notes for next year.
SET A CHALLENGING YET ATTAINABLE GOAL

ACCESS 2018 DATA

Employee Giving Total:

Leadership Giving ($1,000+ annually):

# of Employees

# of Donors

# of Leadership Givers

IDENTIFY POTENTIAL

TOTAL increased participation:
(Average gift $ multiplied by # of new donors)

TOTAL Leadership increase:
(# of new Leadership Givers multiplied by $1,000)

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? Consider these types of questions when working to increase corporate support for United Way of Tarrant County.

IDENTIFY GROWTH

2018 Total Employee Giving

Potential growth based on new donors

Potential growth based on new Leadership Givers

Potential company gifts

CALCULATE YOUR 2019-2020 GOAL

2018 Total Employee Giving

+ Potential growth based on new donors

+ Potential growth based on new Leadership Givers

+ Potential company gifts

TOTAL

Previous 3-year giving totals:

2016:

2017:

2018:

Difference year-to-year:

2016 to 2017 %

2017 to 2018 %

CAMPAIGN MATERIALS AVAILABLE TO YOU

PRINTED

Brochures

Pledge Forms

SIGNAGE

Posters

X-frame Banners

ONLINE

Videos: unitedwaytarrant.org/campaigncentral

Success Stories: unitedwaytarrant.org/liveschanged

Online materials include all printed materials and posters.
UNITED WAY OF TARRANT COUNTY LOGO USAGE

FULL COLOR

The full-color version of the United Way brandmark is the primary brandmark of the identity system. It is required that this version be used in branded applications whenever possible.

Pantone spot color is the preferred usage, but CMYK and RGB reproduction files of the full-color brandmark are available for specific application requirements.

CLEAR SPACE

Clear space frames the logo and separates it from other elements including text and the edge of printed materials. The logo must be surrounded with at least the required minimum of clear space which is determined by 1/2 the height of the symbol square.

UNACCEPTABLE USES

The consistent and correct application of the United Way brandmark and the local identifier is essential. Always follow the standards presented in these guidelines. The examples on this page illustrate some of the unacceptable uses of the United Way brandmark.

NOTE: For any external collateral involving United Way of Tarrant County’s logo, feel free to email marketing@unitedwaytarrant.org for assistance or approval.