

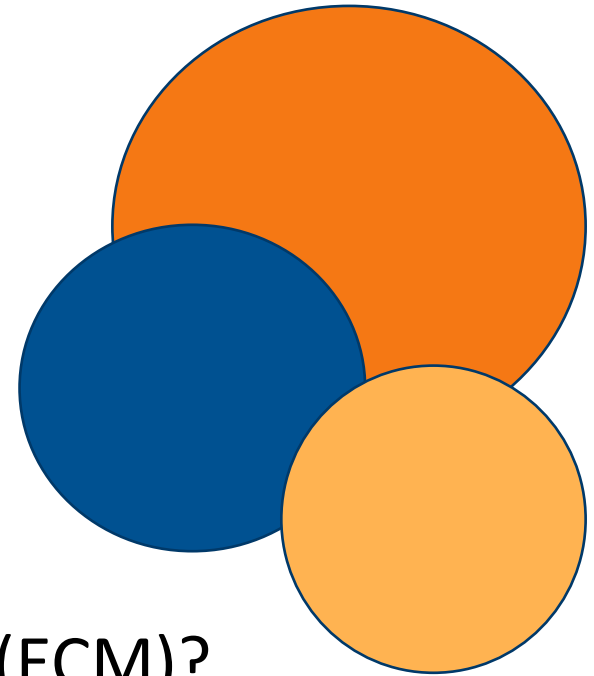


United Way of the Ohio Valley

Employee Coordinator Training

Welcome and Introductions!

- Your Name?
- What Company do you work for?
- How long have you been Employee Campaign Manager (ECM)?



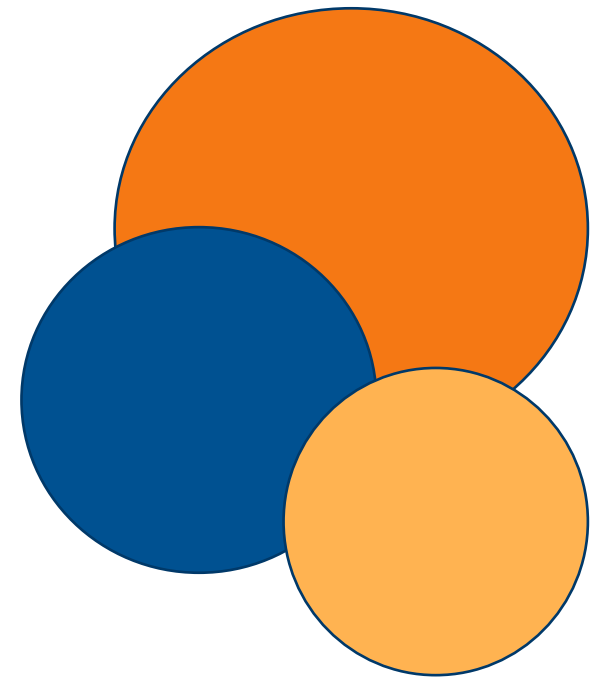
Advancing the Common Good



- Protecting services for those most vulnerable in the community
- Making long term investments in Education, Financial Stability, and Health because these are the building blocks for the best quality of life
- Our Promise to change the Odds by: Giving, Advocating, Volunteering

Did you know?

- 99 cents of every dollar stays local
- 82 cents of every dollar supports local programs and initiatives



Hunger Relief

- 1 in 4 children are without food in our area
- 1 in 6 people are food insecure
- 26,778 are without resources to good food
- 20.48% children living in food insecure homes
- 9,286 children are food insecure
- 6% of seniors are receiving HDM & Congregate Meals



Feeding Hungry People

Convening - Connecting

Awareness

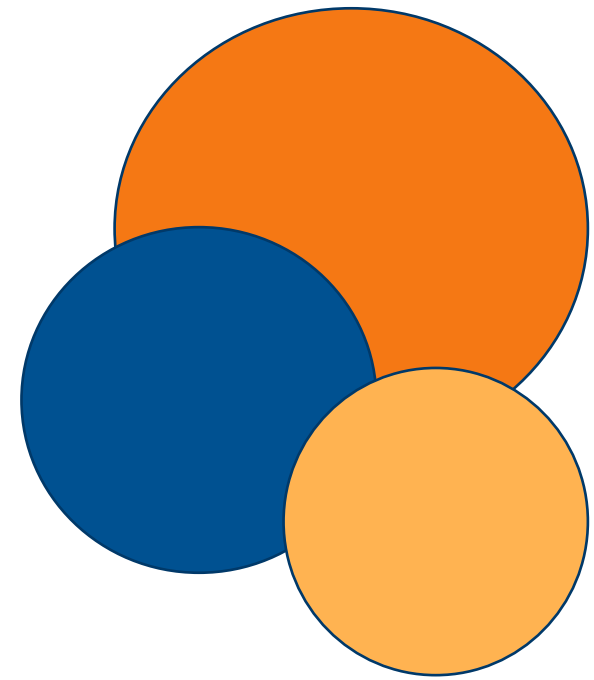
Making People Aware
of Food Insecurity

Access

Connecting Hungry
People to Food

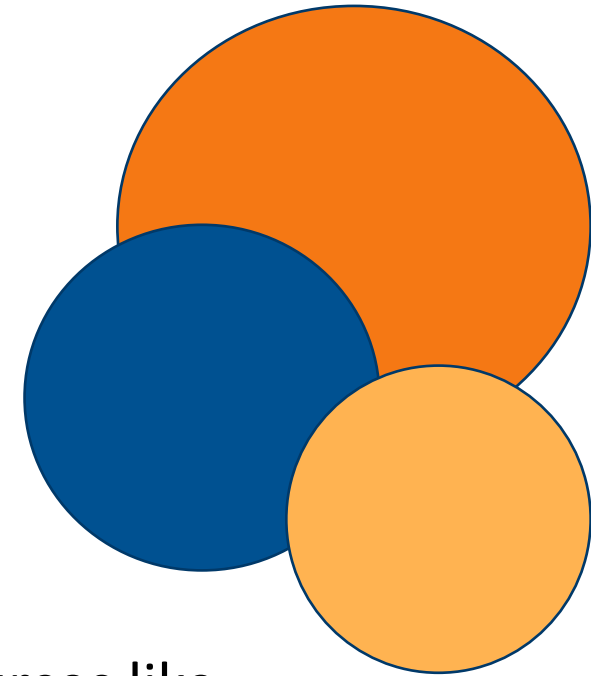
Advocacy

Influencing Change





Get Connected. Get Help.™



- A contact center connecting people with available resources like food, housing, health care, senior services, child care, legal aid, volunteer opportunities and much more!
- Proves real time access to health and human service delivery system
 - **Open 24/7, 7 days a week, 365 a year**



34%

Housing



27%

**Utility
Assistance**



13%

Food



8%

Health Care



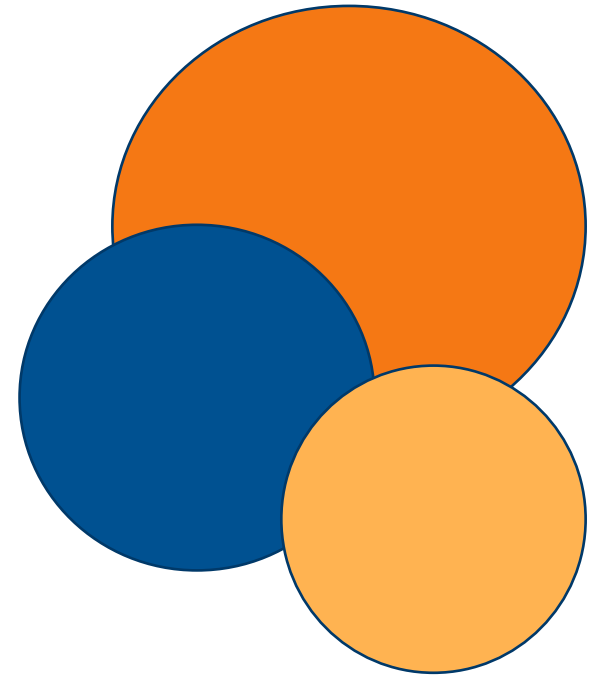
18%

Other

(transportation, special
populations, clothing, etc.)



Practical Manners of Campaign



- 10 Steps to a successful campaign
- Provide recommended timeline
- Conduct Goal Setting Exercise



A Model Campaign

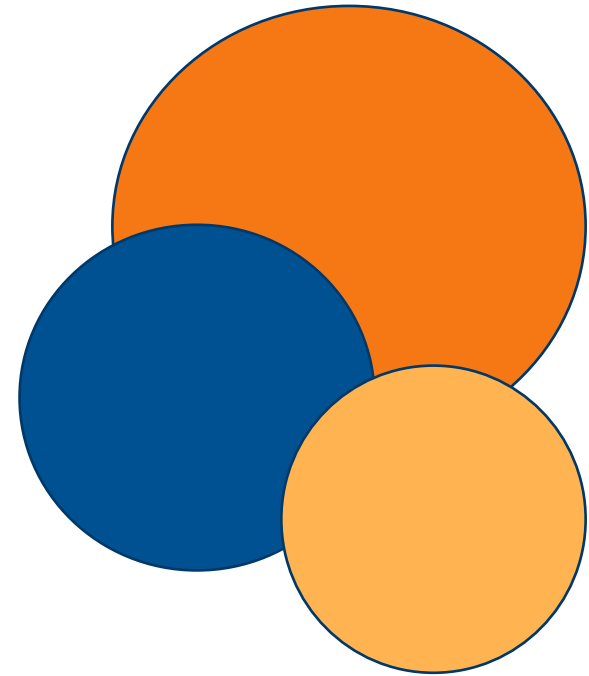
10 STEPS TO A SUCCESSFUL CAMPAIGN

1. Attend Employee Campaign Manager Training
2. Have CEO personally endorse the campaign
3. Recruit a diverse campaign team
4. Set a challenge goal & communicate it
5. Hold a separate Leadership Giving Campaign
6. Educate employees about United Way
7. Make Giving Easy
8. Organize group meetings that ensure 100% of employees are ASKED to give
9. Track progress and follow up on outstanding pledges
10. Report results and say THANK YOU!

Sample Timeline

6 Weeks before:

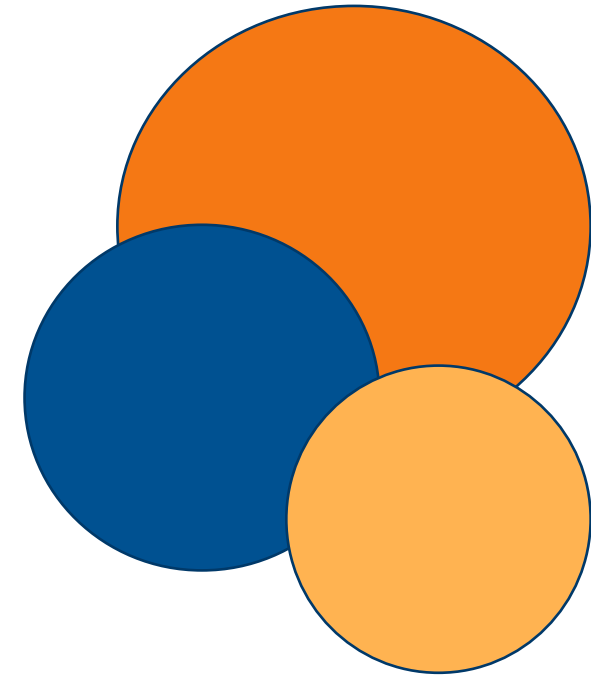
- Meet with CEO or Senior manager to enlist their help in campaign
 - Establish date and timeline
 - Establish process for campaign (in-person; electronic)
- Recruit and confirm campaign committee
 - Representatives from all company departments
 - Leadership giving chair
- Determine agenda and training for campaign committees
- Meet with your UW team member(s)
 - Establish goals and objectives by location / team / departments
 - Adjustable Campaign Thermometer in Excel



Sample Timeline

Leadership Giving – Start 5 weeks out

- Leadership Giving Chair
 - Identify those who have the ability to donate \$20.00 per week or more per year i.e. engineers; accountants; technicians; project, plant and operation leaders; principals; central office personnel; presidents; executive directors and others
 - Develop educational plan based on personalities
 - Establish date and timeline
 - Establish process for campaign (in-person; electronic)
- Recruit and confirm others to make the asks
 - Representatives from different locations / departments
- Hold separate meeting for leadership ask

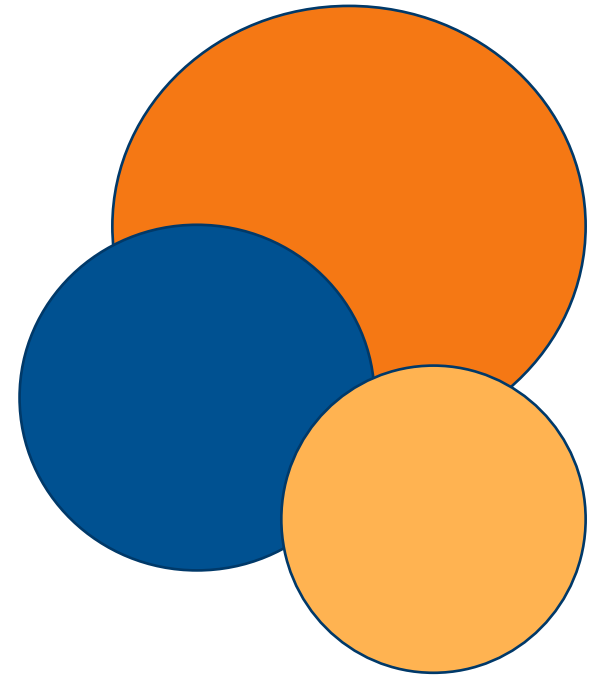


Sample Timeline

4 Weeks before:

- Have your 1st Campaign committee meeting
- Discuss Goal Setting
- Check/order campaign materials (see supply list)
- Request & Schedule agency speakers and/or tours
 - Virtual or in-person

Partner with HR to establish a plan to solicit retirees



Goal Setting Exercise!

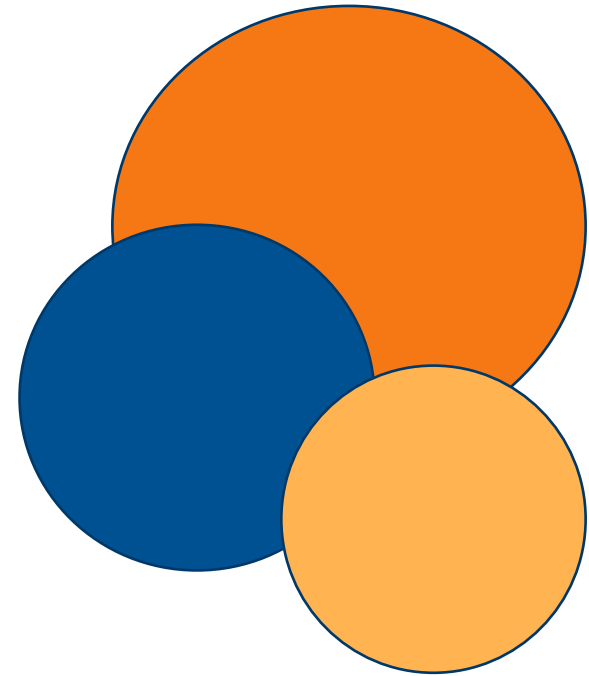
- What 2 ways can you help increase dollars?
- How can you get more people to give?
- How can you increase the current donors to give more?



Sample Timeline

3 Weeks before:

- Recruit campaign representatives from each department – natural leaders / voice of.....
- Have CEO or campaign chair create personal endorsement or support



Sample Timeline

2 Weeks before:

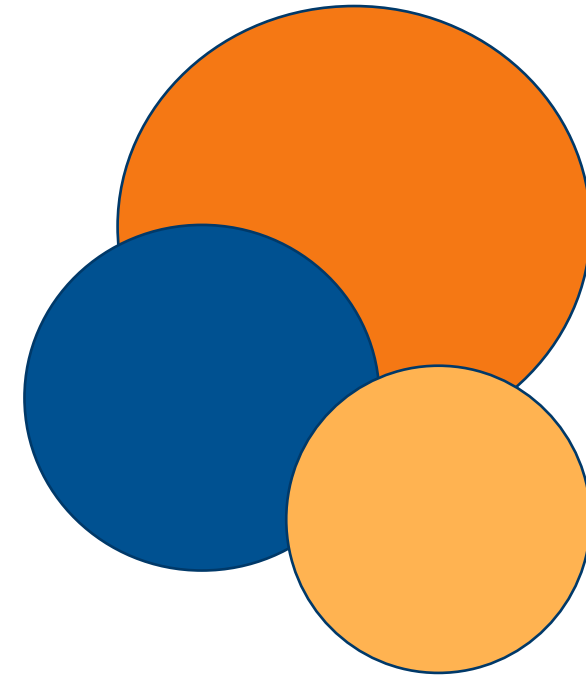
- Begin Educational Campaign
 - What does UW accomplish and why is it important to the community
 - Emails, post on bulletin boards, etc.
- Work with your UW team member to create personalized leadership pledge forms
- Have department managers announce the campaign at staff meetings
- Solicit Retirees



Sample Timeline

1 Week before:

- Continue Education Campaign
 - Beneficiary Stories – written
 - Video from Programs
- Training department campaign representatives
- Send CEO communication to all employees
- Launch Leadership Campaign





Sample Timeline



Kick-off Campaign:

- Hold kickoff event for every level of colleagues
 - Involve others for ideas and organization
- Make it fun and exciting
- Games; activities (on-line or in-person)





Sample Timeline



During Campaign:

- Communicate consistently and often – education campaign
- Hold small group meetings
 - Outside speakers
- Hold giveaways and drawings for those who have returned the pledge forms
- Encourage either increased participation / increased amount of gift





Sample Timeline



Wrapping Up Campaign:

- Confirm that campaign representatives have talked to all employees
- Follow up with past contributors who have not yet responded
- Report progress to all employees regularly and submit interim progress report to UW



Congratulations!

Campaign Finish Line:

- Determine final results and meet with top leadership to discuss
 - Announce total amount raised to employees
- Conduct final meeting with campaign committee
 - What worked, what didn't
 - Suggestions for next year
- Thank / Recognize all contributors



The In-Person Small Group Meeting

- Give every person a pledge card and pen as they walk into the meeting room
- Go over any incentives
- Introduce Speaker(s) whether that be UW Staff or Agency
- Show the Campaign Video
- Make the Ask
- Go over the pledge form in detail
- Answer any questions

WE ARE THE
HAND RAISERS.
WE ARE THE
GAME CHANGERS.
WE LIVE UNITED.



The Virtual Campaign

- Communication and Touch Points - weekly
- Education – Key to success
- Forms with time to return them
- Video's: Campaign Video, Program Speaker Video

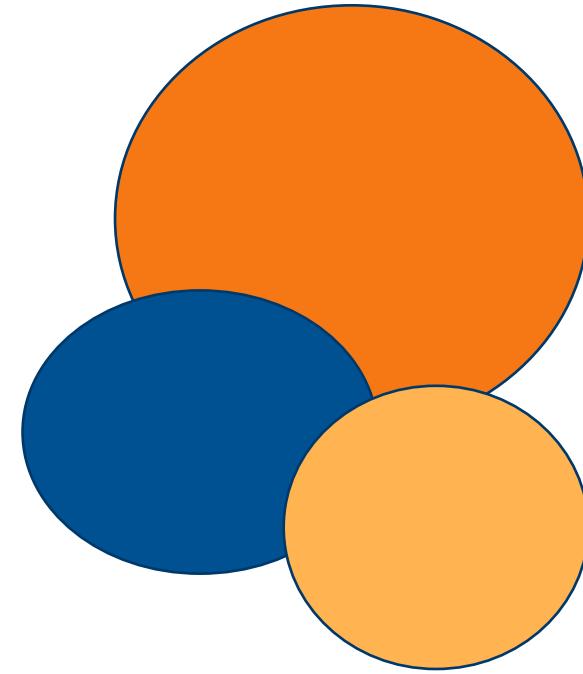
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Paperwork Virtual or Hard Copies

- Supply Order Form
- Report Envelope & Corporate Gift Card:
 - Signatures – Auditor Required
- UW Brochure
 - Hunger Relief & 2-1-1
 - Codes for Designations

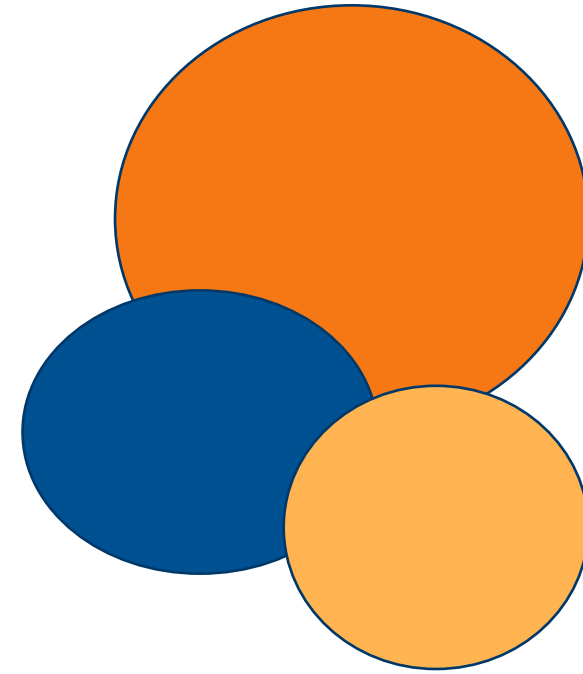
*All forms are located for easy access on the <https://uwov.org/campaign-central/>



Paperwork Virtual or Hard Copies

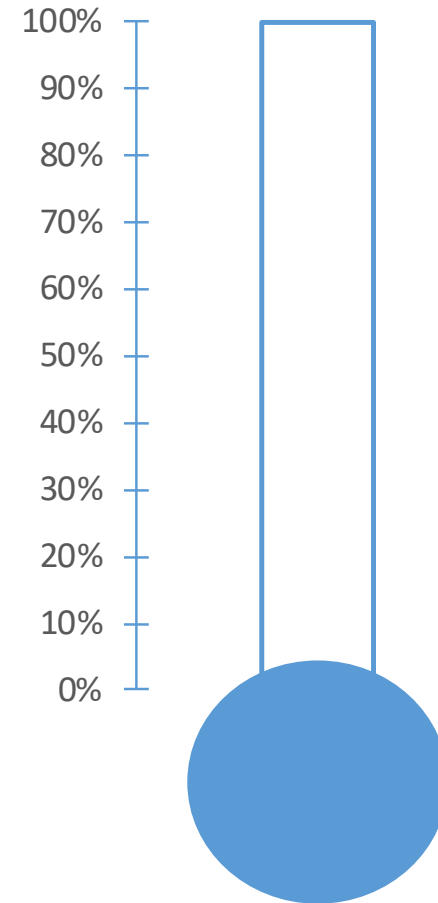
- Pledge Forms – Payroll Deduction (virtual and hard copies)
 - [Pledge Card](#)
 - [Tocqueville Society](#)
- Pledge Forms – Individual / Retirement Donations
 - [Individual](#)
 - [Leadership Society](#)
- Goal Thermometers – customize for your company
 - [Participation](#)
 - [Dollars by Section](#)
 - [Company Goal](#)

*All forms are located for easy access on the <https://uwov.org/campaign-central/>



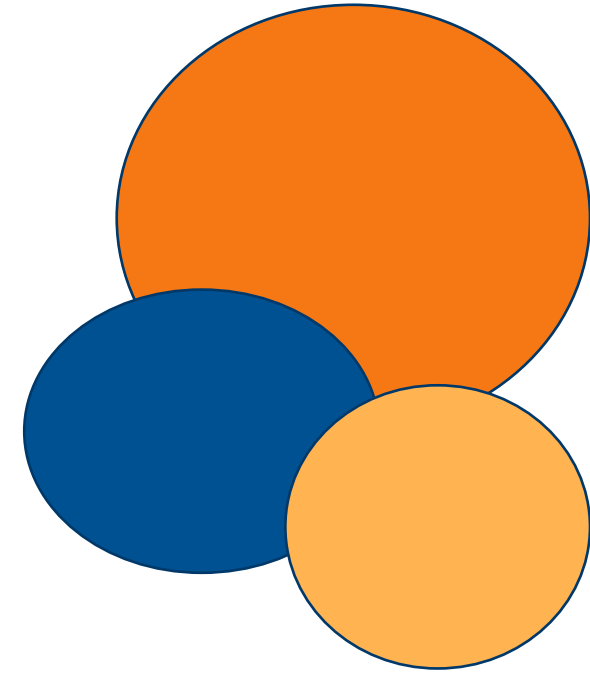
Company Goal Thermometer

Date	Raised Per Week
7-Aug	\$ -
14-Aug	\$ -
21-Aug	\$ -
28-Aug	\$ -
4-Sep	\$ -
11-Sep	\$ -
18-Sep	\$ -
25-Sep	\$ -
2-Oct	\$ -
9-Oct	\$ -
16-Oct	\$ -
23-Oct	\$ -
30-Oct	\$ -
Total	\$ -
Target	\$ 25,000
Achieved %	0%
Target %	100%



Resources Are Available:

- New Employee Breakdown Form: [New Employee Breakdown of UW.docx](#)
- Program Tours (can be done virtually)
- Program Speakers (in-person, recorded or virtual)
- United Way Staff
- Website: <https://uwov.org/>



Questions:

