THE ROLE OF THE EMPLOYEE CAMPAIGN COORDINATOR - ECC

1. PLAN            Assemble a team & plan the campaign
2. INSPIRE         Share United Way’s story and impact
3. ENGAGE          Volunteer & learn
4. ASK             Ask co-workers to invest
5. THANK           Say thank you & celebrate success

As an ECC, you are helping local children, families, and adults find pathways out of poverty.

GET THE ANSWERS YOU NEED

- What is United Way?
- Why give?
- Why is United Way focused on poverty?
- What can $2 do?
- How does United Way make funding decisions?

Find answers and more at UnitedWayofWilson.org

YOUR UNITED WAY TOOLKIT RESOURCES - unitedwayofwilson.org CAMPAIGN

- Speaker Request
- Marketing Materials
- Impact Statistics & Stories
- Special Event/Incentive Ideas
- Pledge Form - fillable PDF
- Videos (Agency Tours & Campaign Video)

Contact Betty Baker: asstdir@unitedwayofwilson.org
to receive any of the above materials. 237-3194 ext 202
CAMPAIGN TIPS

10 BEST PRACTICES FOR A SUCCESSFUL CAMPAIGN

1. Build a team and secure CEO/management support.
2. Determine your timeline and start planning at least 2-4 weeks before your kick-off.
3. Set your goal.
4. Plan your campaign activities.
5. Incorporate volunteering into your campaign.
6. Promote your campaign to employees (and retirees).
7. Start your campaign with a fun, inclusive kick-off.
8. Organize special events and use incentives.
9. Recognize leadership donors, first time donors, etc.
10. THANK employees and celebrate success!

UNITED WAY CAN HELP WITH...

- Running reports
- Sending thank you notes, videos, marketing collateral, etc.
- Speaking at meetings, visiting agencies and special events
- Participating in campaign team meetings
- Identifying opportunities for volunteering
- End of campaign analysis and debrief

UnitedWayofWilson.org
**CAMPAIGN PLANNING WORKSHEET**

What are your campaign goals?

Total campaign $: ___________________

# of new donors: ___________________

% participation rate: ___________________

OTHER: ___________________

What are your campaign dates?

Start: ___________________

End: ___________________

Who do you want on your campaign team?

•

•

Who in executive management will you recruit to help?

•

•

What campaign events/volunteer activities will you plan?

•

•

---

**CAMPAIGN WRAP UP**

• Collect pledge forms, cash, and checks

• Report results to employees & prepare envelope for UW

• Update United Way on the # of employees at your company

• Call United Way to pick up envelope or drop off at UW

• Evaluate your campaign and start planning for the future
Fillable pledge cards are available. Email Betty Baker at: asstdir@unitedwayofwilson.org or call 237-3194 extension 202
### United Way of Wilson County

**Worksheet**

**Company:**
**Division:**
**Address:**
**Solicitor’s Name:**
**Date:**
**Phone:**

---

**Summary Sheet**

**Company:**
**Division:**
**Address:**
**Solicitor’s Name:**
**Date:**
**Phone:**

---

**Employee Gift**

<table>
<thead>
<tr>
<th>Employee Gift</th>
<th>Corporate Gift</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

**Fill in when campaign is complete.**

**BREAKDOWN OF CONTRIBUTIONS**

<table>
<thead>
<tr>
<th>Employee Gift</th>
<th># Contributors</th>
<th>Total Pledged Cash/Checks</th>
<th>Balance to be billed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Deduction</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Bill Direct</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Cash or Check</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Employee Totals</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

| Corporate Gift        | $              | $                         | $                    |

| Corporate & Employee GRAND TOTAL | $              | $                         | $                    |

---

**CAMPAIGN AWARDS:**

- **Diamond Award** = $2,000 Per Capita
- **Platinum Award** = $1,000 Per Capita
- **Gold Award** = $800 Per Capita
- **Silver Award** = $60 Per Capita
- **Bronze Award** = $40 Per Capita

The Award Criteria is based on Per Capita Giving. The total employee gift is divided by the total number of employees to equal the per capita gift. Example: $300 - employee gift, 15 employees = $60 per capita gift. If you are eligible for a Diamond, Platinum, Gold, Silver or Bronze Award, please check here: ______
Submit your reports with your Report Envelope by October 31 to be entered into the $2,500 Drawing

United Way of Wilson County

CORPORATE AND EMPLOYEE REPORT ENVELOPE

If you have any questions contact Betty Baker 237-3194 ext 202

FIRM/ORGANIZATION NAME: Acme Company  
ADDRESS: 509 Main Street  
ZIP: 27893  
SOLICITOR: Sue Barnes

UW ACCOUNT #: 246  
TOTAL EMPLOYED: 8  
DATE: 09/28/23

CONTRIBUTIONS REPORTED TODAY
(Not those previously reported)

<table>
<thead>
<tr>
<th>TOTAL CORPORATE CONTRIBUTION</th>
<th>TOTAL PLEDGED</th>
<th>CASH/CHECKS ENCLOSURES</th>
<th>BALANCE TO BE BILLED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not previously reported. Enclose card.</td>
<td>$200.00</td>
<td>$0.00</td>
<td>$200.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CONTRIBUTIONS FULLY PAID</th>
<th>NUMBER OF CONTRIBUTORS</th>
<th>TOTAL AMOUNT</th>
<th>CASH/CHECKS ENCLOSURES</th>
<th>BALANCE TO BE BILLED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach each payment securely to the card to which it applies.</td>
<td>1</td>
<td>$210.00</td>
<td>$210.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>TO BE BILLED Enclose signed cards.</td>
<td>1</td>
<td>$175.00</td>
<td>$0.00</td>
<td>$175.00</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>$980.00</td>
<td>$0.00</td>
<td>$980.00</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>$1,365.00</td>
<td>$210.00</td>
<td>$1,155.00</td>
</tr>
</tbody>
</table>

TOTAL EMPLOYEE CONTRIBUTION

| CORPORATE & EMPLOYEE GRAND TOTAL for this report | $1,565.00 | $210.00 | $1,355.00 |

FOR UW OFFICE ONLY

billing address of payroll location
Same as Above

partial report: ☐  
final report: ☑
Spread the news!! Fair Share Givers who donate to the United Way of Wilson County 2023 Campaign may be eligible to participate in the Fair Share Challenge - A $2,500 Give Away!!

**FAIR SHARE CHALLENGE**

*Good things come to those who Care!*

Thank you for your FAIR SHARE Investment!

Your Fair Share Investment in United Way of Wilson County is important to our community and is greatly appreciated.

To show our appreciation, United Way of Wilson County is offering you this chance to win a $2,500 cash prize.

**It’s Easy...**

As a Fair Share Giver your name will be entered into a pool of finalists to the Fair Share $2,500 Give Away! If you would like to participate in this exciting event, please return the entry form below to your Campaign Coordinator within 3 business days.

1. Complete the below entry form. An individual must be at least 18 years old, has a valid Social Security number or ITIN number, and makes a Fair Share contribution of $5 or more to United Way of Wilson County’s 2023 Community Investment Campaign. Checks must be submitted to the United Way of Wilson County. Please do not mail to United Way of Wilson County. United Way reserves the right to disqualify any entry.

2. Completed entry form must be returned to your Campaign Coordinator within 3 business days of receipt. The entry form will be entered into a drawing, and a winner will be selected. The winner will receive a $2,500 cash prize. The winner will be notified by telephone or email.

3. Who is eligible? United Way of Wilson County staff, agency staff, and United Way committee members.

4. How the drawing works: Beginning with an initial drawing on November 1, 2023, all entries will be entered into a drawing, and a winner will be selected. There will be 18 finalists selected at random from all entries. The winner will be notified by telephone or email. The winner will receive a $2,500 cash prize. The winner will be notified by telephone or email.

5. Campaign Coordinators will verify social security numbers prior to the final drawing event.

6. Requirements: The winner must provide United Way of Wilson County with proof of Social Security number or ITIN number in order to win the $2,500 Grand Prize. United Way of Wilson County will mail the winner an IRS Form 1099.** The winner is required to pay all applicable taxes, and must pay his/her pledge in full to United Way of Wilson County by December 31, 2024**. The winner grants United Way of Wilson County the right to use their name and photograph in all communication and publicity materials.
NOTES:

IMPORTANT DATES -
FAIR SHARE DRAWING BEGINS 11/01/23
GENERAL CAMPAIGN END DATE 10/31/23
WILSON COUNTY SCHOOL END DATE -

CONTACT INFORMATION
UNITED WAY OFFICE NUMBER 237-3194

CAMPAIGN - BETTY BAKER:
asstdir@unitedwayofwilson.org
extension 202

RESOURCE DEVELOPMENT - KATHY BERNI: MONDAY—WEDNESDAY
development@unitedwayofwilson.org
extension 205
When can we start our campaign? Start your campaign as soon as you are ready. Our Campaign runs from 9/1 - 10/31. Our $2,500 drawing for Fair Share Givers begins on November 1.

How do I get an Agency speaker? The United Way staff can work with you to schedule a speaker. asstdir@unitedwayofwilson.org

Our work environment is not conducive to holding a campaign kick-off. How can I involve our employees in the campaign experience? Take the campaign to them. Some ideas are to use e-mails, voice mails, videos and/or letters from your top management to get the word out. Designate one room as the “United Way Room” and hold an Agency Fair. Create a festive atmosphere in the breakroom with snacks and games that they can enjoy when they turn in their pledge forms.

How long should our workplace campaign last? Most campaigns can be completed in two or three weeks. The goal is to distribute and collect pledge cards while the United Way message is still fresh in employees’ minds.

I have limited time to devote to a campaign. How can I work it into my busy schedule? Contact your United Way 237-3194 ext. 202. We are here to help you every step of the way. Let us know your limitations and we will come up with a plan together to make it easier for you. Another way to ease the strain is to recruit a committee. Assign tasks and assume a management role. Most importantly, start planning early. The earlier you start the easier the process will be for you.
What we RAISE in Wilson County STAYS in Wilson County!

Giving Questions?

How can I be sure my donation will be used efficiently and effectively?
When you give in Wilson County you support the United Way of Wilson County’s work, our programs and initiatives and our member nonprofit organizations who provide services throughout our community. United Way volunteers visit each of our member nonprofit organizations and determine funding based on programs, services, individuals served, financial reporting and the impact that each organization has in areas of education, health and financial stability. (The United Way and all of our agencies are audited by an independent auditor.)

If I stop working for my current employer, what happens to my payroll contribution pledge?
Your pledge will not be automatically routed to your new place of employment or to your home. If you do change jobs or are no longer working, please contact the United Way staff at: 237-3194. At that time, you can decide whether you are able to fulfill your original pledge or adjust it. If you have switched jobs and your current employer runs a United Way Campaign, it is possible to set up payroll contribution through the new employer.

Some of our employees and their families are on tight budgets; should we invite them to be part of the campaign? Yes, most people appreciate the opportunity to participate. Giving through payroll contribution is easy and convenient.
Betty Baker asstdir@unitedwayofwilson.org
Or
237-3194 extension 202

BELIEVE THERE IS GOOD IN THE WORLD