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Words from our leadership

Dear Employee Campaign Manager,

We know that United Way campaigns at more than 1,500 companies throughout our metro area don’t just happen. They are envisioned, led and accomplished by dedicated people like you – our Employee Campaign Managers (ECMs). And for that we offer you our deepest gratitude and admiration.

The ECM at each company is truly at the heart of making a United Way campaign successful – and successful campaigns mean that thousands of children, teens, adults and families throughout Greater Kansas City will receive the help they need.

We know that serving as ECM means additional responsibilities for you, and we truly appreciate your willingness to provide that leadership in order to help our community.

We hope the information included in this guide will give you the tools, best practices and guidance you need to make your 2016 United Way Campaign as successful as possible.

Our campaign theme this year is “You. Me. One KC.” It means that each one of us, coming together through the United Way campaign, can make a stronger, more thriving KC possible for all of us. But we also know the “you” in that tagline has special meaning when it refers to YOU, our Employee Campaign Managers. This truly wouldn’t be possible without you and the tremendous leadership you provide.

Thank you!

Steve Edwards
Chairman & CEO
Black & Veatch
2016 Campaign Co-Chair

Alise Martiny
Business Manager
KC Building & Construction Trades Council
2016 Campaign Co-Chair

Brent Stewart
President & CEO
United Way of Greater Kansas City
ECM
/ˈeɪ-sə-em/
noun
Employee Campaign Manager • A person who helps his/her organization work with United Way and leads the organization’s annual United Way campaign through planning, implementation and evaluation.

WHAT DOES AN ECM DO?
• Educates co-workers about United Way and provides opportunities for them to get engaged
• Assembles a committee of ambassadors; your colleagues help you build support for the campaign
• Sets goals to increase giving and volunteering (number of donors, dollars raised)
• Holds a campaign kickoff and coordinates other special events
• Distributes United Way materials and pledge forms to colleagues; prepares and submits completed pledge forms to your United Way liaison

BENEFITS OF BEING AN ECM:
• Showcase your leadership and project management skills at work
• Network with colleagues at your organization and in other industries
• Create positive impact in your community

YOUR TEAM AT UW
Donor Relations Manager | United Way staff member who assists ECMs with campaign efforts, including year-round activities.

Loaned Executive or Campaign Associate | Staff member from a United Way corporate partner who volunteers during campaign season and helps the donor relations manager.

Gift Processing | United Way team that processes pledges made during campaign.

ePledge and eWay Coordinator | (if applicable) United Way team that builds and supports digital platforms for giving.
Educating our new associates and pushing our existing donors from different markets to higher levels made our campaign fun and built up our team. It is fun to see your team work together toward a common goal for our community!

Carly Lepic
ECM | SCHEELS

Working with United Way has given me a better appreciation for what United Way does for the whole of our community. Such great, local programs make it easy to help our employees find a connection that makes their giving meaningful.

Amanda Hembree
ECM | SULLIVAN HIGDON & SINK
Campaign Timeline

**PRE-CAMPAIGN**
4 TO 6 WEEKS BEFORE CAMPAIGN KICKOFF

Attend ECM training
- Host planning meetings with your United Way Donor Relations Manager to map out campaign strategy

Analyze past results and set campaign goals: dollar amount and/or number of participants
- Build campaign team
- Plan Kickoff Rally

**POST-CAMPAIGN**
DURATION: 1 WEEK

Announce results to company
Thank ambassadors and employees with an event, email or letter
- Debrief with your United Way Donor Relations Manager
- Coordinate year-round engagement activities for your employees

**CAMPAIGN**
DURATION: 1 WEEK TO 1 MONTH

Host a kickoff event with a United Way Donor Relations Manager in attendance
- Conduct leadership giving meeting
- Encourage ambassadors to talk about campaign and giving options
- Schedule personal asks
- Send emails about activities (reminders about events, last day of campaign giving, volunteer opportunities, etc.)
- Collect pledge forms; if running an e-campaign, encourage completion of e-pledges

**CELEBRATE YOUR CAMPAIGN**

Attend United Way’s Victory Celebration on December 1 at the Intercontinental Hotel!
Best Practices

**TOP-LEVEL SUPPORT AND CORPORATE MATCH**

Endorsement from your company’s CEO is vital to the overall success of your United Way fundraising efforts. A corporate match on employee dollars is a great way to incentivize a donor’s pledge.

**CONDUCT A FUN AND EDUCATIONAL CAMPAIGN**

- Don’t run your campaign alone — form a committee!
- Use incentives to turn special events donations into payroll deductions/monthly pledges.
- Educate before asking: communicate United Way’s work in Greater Kansas City and the needs of our community.
- Promote United Way via social media and internal resources.

**ENGAGE LEADERSHIP TO STRENGTHEN YOUR COMPANY’S INVESTMENT**

- United Way leadership donors are leaders in their organization, leaders in our community and leaders in generosity.
- The success of UWGKC depends on the community working together to change people’s lives and create lasting results. Leadership donors build the foundation of that success.

**GOAL-SETTING WORKSHEET**

Set a challenging, yet attainable goal. Be ambitious but realistic so your co-workers have an attainable goal to reach.

### 2015 TOTALS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Contribution, Special Events</td>
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<tr>
<td>Corporate Gift</td>
<td></td>
</tr>
<tr>
<td># Leaders</td>
<td></td>
</tr>
<tr>
<td>% Participation</td>
<td></td>
</tr>
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</table>

### 2016 GOALS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Contribution + Special Events</td>
<td>$</td>
</tr>
<tr>
<td>Corporate Match/Gift</td>
<td>$</td>
</tr>
<tr>
<td>New Leaders × $1,200</td>
<td>$</td>
</tr>
<tr>
<td>New Donors × $</td>
<td>$</td>
</tr>
<tr>
<td>Average Gift</td>
<td>$</td>
</tr>
<tr>
<td>Total $</td>
<td></td>
</tr>
<tr>
<td>% Increase</td>
<td></td>
</tr>
</tbody>
</table>

**REVIEW AND WRAP-UP**

- Thank all your donors
- Provide copies or scans of your pledge forms to your payroll department
- Meet with United Way staff member to review the campaign report envelope
- Inform your leadership team of campaign results
- Plan year-round activities with your Donor Relations Manager, like donation drives and volunteer events that match your company’s focus area
STRATEGIES FOR A SUCCESSFUL ASK

How to ask for a pledge

GET DONORS’ UNDIVIDED ATTENTION
• Start the discussion on a positive, friendly note
• Explain the purpose
• Find out what they know about United Way

EXPLAIN UNITED WAY AND WHY YOU SUPPORT US
• Bring UWGKC materials and be prepared to explain them. Provide flyers to each person or use a front-of-the-room presentation
• Share a personal story, success story or United Way facts

ASK FOR THE PLEDGE
• With new donors, ask for a first-time gift and offer an incentive for giving
• For annual donors, encourage or incentivize them to increase their gift
• Consider asking for a specific increase, such as $1 more a week or pay period or a 10% increase
• Remember, you are not asking for yourself; you are asking on behalf of someone who needs help
• Offer incentives for turning in a pledge form or submitting an ePledge

ANSWER QUESTIONS AND HANDLE CONCERNS
• Know your materials and answer questions honestly – never guess
• If you don’t know the answer to a question, let the donor know you will find out and then follow up with your Donor Relations Manager
• Recognize that some donors have real concerns; people have a right to feel good about their gift

SAY “THANK YOU”
• Regardless of what the donor decides, thank them for their time
• People like to know their gift is appreciated
Setting a UW meeting

SAMPLE AGENDA

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PRESENTER</th>
<th>DURATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening remarks</td>
<td>ECM</td>
<td>2 minutes</td>
</tr>
<tr>
<td>CEO Endorsement</td>
<td>CEO</td>
<td>1 to 5 minutes</td>
</tr>
<tr>
<td>United Way Overview</td>
<td>DRM</td>
<td>9 minutes</td>
</tr>
<tr>
<td>The Ask</td>
<td>ECM and DRM or CEO</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Closing Remarks</td>
<td>ECM</td>
<td>1 minute</td>
</tr>
</tbody>
</table>

MOST IMPORTANTLY — SAY THANK YOU!

CAMPAIGN THEME IDEAS
- Broadway/Hollywood/movies
- Pirates/cowboys
- Sports/local teams
- Hawaiian/beach
- Superheros
- James Bond
- Decades/History
- Carnival/Mardis Gras
- Olympics

INCENTIVE IDEAS
- PTO – hour, half day, full day
- Coupons or gift certificates
- Movie or sports tickets
- Prime parking spaces
- Dress down days
- Sleep-in-late or leave-work-early days
- Mugs, t-shirts, key chains, etc.
- Lunch or dinner with CEO
Campaign Tools

United Way provides a variety of both print and digital materials for you to use in building a campaign that will be most effective for your company.

Here are the items you can choose from:

**Print**

You may order quantities of any of these materials that United Way will print and deliver to you, or we can provide you with the artwork for your company to print internally.

**CAMPAIGN OVERVIEW BROCHURE**
Gives a brief overview of what United Way does and what impact your gift to United Way can make in our community.

**LEADERSHIP BROCHURE**
For donors with the potential to make a leadership gift ($1,200 or more), this booklet outlines the benefits and giving society memberships available to our most generous donors.

**WHAT YOUR GIFT PROVIDES/WHAT WE MADE POSSIBLE FLYER**
Two-sided letter-sized flyer gives specific examples of what an individual gift provides and the improvements that our combined investment in United Way have made possible in our community.

**OUR WORK BROCHURE**
Provides an overview of how United Way invests in programs in our community that affect people at all stages of life: Healthy Beginnings, Prepared Youth, and Thriving Adults & Families.

**INCENTIVES FLYER**
Letter-sized page that outlines United Way’s Caring Club (open to those who donate $192 or more) and other incentives that United Way offers for donors at varying levels.

**PLEDGE FORMS**
Paper versions of our pledge form are available for all campaigns.

*Be sure you make a copy of each paper pledge form before you turn the originals in to United Way.*

**THERMOMETER POSTER**
11 x 17” poster to track your progress toward reaching your company’s campaign goal. (Artwork also available for you to print in a larger size if your company has that capacity.)
**POSTERS**
Thirteen 11x17” posters that feature UMe1KC art and individual donor/recipient stories.

**UNITED WAY 2-1-1 CARDS**
Business cards that give brief information about the services provided by United Way 2-1-1, our free 24-hour call center for those seeking community resources.

**Digital**
All print materials can be viewed and downloaded as PDFs at [http://www.unitedwaygkc.org/creating-an-impact/campaign-tools/](http://www.unitedwaygkc.org/creating-an-impact/campaign-tools/)

**EMAIL TEMPLATE**
An Outlook email template designed with campaign graphics is available for your internal emails.

**SAMPLE MESSAGING** and art for screens (intranet, screen savers, other internal screens)

**SAMPLE COPY AND ART** for social media use, including a badge/filter that employees can use on their personal social media pages to indicate they have donated to United Way.

**USE HASHTAGS #UME1KC AND #UNITEDWAYGKC** for all of your United Way-related social media posts.

**Video**
View this year’s campaign video online:

**United Way website:** www.unitedwaygkc.org,

**YouTube:** https://youtu.be/QbnuXAv eoV0

**Download from Vimeo:** https://vimeo.com/unitedwaygkc/videos
United Way helps people in the Greater Kansas City community reach their full potential. We do this through raising money and support and investing that support into community programs that positively impact those in need through every part of their lives. Our work is about connecting children, teens, adults and families with the tools and support they need to thrive.

In short, United Way works with everyone in the community to make the community better for everyone.

United Way also provides a free, confidential call center and a comprehensive online database to connect those in need with the community resources that can help them. United Way 2-1-1 call specialists are available 24 hours a day, 365 days a year.

**Key Messaging/FAQs**

**ELEVATOR SPEECH**

United Way helps people in the Greater Kansas City community reach their full potential. We do this through raising money and support and investing that support into community programs that positively impact those in need through every part of their lives. Our work is about connecting children, teens, adults and families with the tools and support they need to thrive.

In short, United Way works with everyone in the community to make the community better for everyone.

**OUR IMPACT AREAS**

**HEALTHY BEGINNINGS**

Healthy, thriving young children ready for school success

**PREPARED YOUTH**

The next generation ready for career and life success

**THRIVING ADULTS & FAMILIES**

Connecting children, adults and families with tools and supports to thrive

**CYCLE OF SUCCESS**

Connecting children adults and families with tools and supports to thrive.

**UNITED WAY 2-1-1**

United Way also provides a free, confidential call center and a comprehensive online database to connect those in need with the community resources that can help them. United Way 2-1-1 call specialists are available 24 hours a day, 365 days a year.
WHERE DOES MY MONEY GO?

All funds donated to United Way of Greater Kansas City stay here to help those within our own community.

United Way provides funding for major initiatives we lead in collaboration with community partners, as well as providing funding for 158 programs at 308 partner nonprofit agencies.

ADMINISTRATIVE COSTS

United Way of Greater Kansas City’s administrative costs are 12 percent, with 88 cents of every dollar donated going directly to providing services. This is one of the lowest percentages of administrative costs among all nonprofits in Greater Kansas City.

The Better Business Bureau recommends that all nonprofit organizations should have administrative costs of 25 percent or less.

More details about United Way’s financials can be found on our website at http://www.unitedwaygkc.org/discover-your-united-way/financials/
Closing Out Campaign

Handling Paper Pledge Forms During Campaign

• At the close of the campaign, follow up with your staff to make sure no one has forgotten to submit their pledge form to you

• The following information is required in order for the pledge form to be processed:
  » Name
  » Address
  » Employer
  » Total annual gift

• Make copies of finished pledge forms and submit to your HR or payroll team for filing

• Fill in the information on the front of the envelope to the best of your ability
  » Place pledge forms, along with any cash or checks collected, into the Campaign Envelope provided by United Way
  » Remember to include documentation supporting any corporate gifts included in your campaign total (corporate pledge form, email/letter confirming your organization’s intent to make a corporate gift; please make sure document includes dollar amount)
  » Don’t forget to include any special event money raised as well

• Reach out to your United Way contact to pick up the envelope

• Thank your staff!

Running ePledge or eWay Digital-Giving Platform

• Upon closing the digital pledging portal, United Way will send you a final report containing all giving information

• United Way will send you a payroll deduction file containing all payroll pledges; Please provide contact information for your payroll department if you would like information sent directly to them.

• Submit payroll deductions to your HR or payroll team for filing
Tips for Year-Round Engagement

United Way’s three core actions are: Give. Advocate. Volunteer. Upon completing the end-of-year giving campaign, the rest of the year your relationship to United Way should focus on advocacy and volunteering.

Advocate

SOCIAL MEDIA

• Stay up to date on United Way’s work by following us on Facebook, Twitter, Instagram and Snapchat.
• Participate in social media campaigns around United Way’s community focus on Healthy Beginnings, Prepared Youth, and Thriving Adults & Families.

OUR PUBLIC POLICY PLATFORM

• United Way works in collaboration with volunteers, community partners, and health and human service advocates to support these policy positions and principles at the local, regional and state levels in 2016.
• To read our public policy agenda, click here.

Volunteer

UNITED WAY IS YOUR HOME FOR CONNECTIONS TO VOLUNTEER OPPORTUNITIES ALL ACROSS THE COMMUNITY

Check out United Way’s Volunteer Portal, where you can find opportunities that fit your schedule, interest, and location!

UNITED WAY VOLUNTEER EXPERIENCES

Year-round United Way engagement opportunities including Team Smile, Poverty Simulation, Mad City Money and VITA (Volunteer Income Tax Assistance).

SKILLED VOLUNTEERING

Opportunities abound for skilled volunteering. Please reach out to your United Way contact for more information.

Meaningful community solutions require more than money or programs or policies. The kind of real and lasting change that benefits everyone is only possible when people from all walks of life are willing to roll up their sleeves and go where their time and talent is most needed.

Please visit www.unitedwaygkc.org to find an up-to-date list of volunteer opportunities around the KC metro area. For questions or additional information on volunteering please contact Liz Wilkin, Engagement Manager, at liz.wilkin@uwgkc.org or 816-559-4769.