TIPS & TRICKS

- Provide employee roster to United Way if you want personalized pledge forms or electronic pledging
- Confirm payroll deduction details with Human Resources/Payroll Department
- Identify campaign team members and determine budget several months before your campaign
- Set consistent planning meetings for your campaign team
- Create a theme for your campaign
- Consider fun incentives like a weekly gift card drawing for those who donate
- Be prepared to answer questions and concerns about United Way (check out our FAQ!)
- Stay involved with United Way throughout the year - we have many volunteer opporunities and events you can join!
- Promote United Way affinity groups (Young Leaders Society and Women United)

UNITED WAY CAN HELP BY...

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

QUICK START GUIDE

EMPLOYEE CAMPAIGN MANAGER (ECM)

A guide to running a United Way workplace camapign as an Employee Campaign Manager (ECM)

ROLE OF ECM

1. **PLAN**   Assemble a team and create a plan.
2. **ENGAGE**   Educate and inspire your colleagues.
3. **ASK**   Ask your colleagues to donate.
4. **THANK**   Say thanks and celebrate success.

FAQ

What is United Way?
United Way of Santa Barbara County is a local nonprofit organization that has provided children, adults, and families with services and resources since 1923. United Way improves education, health, and financial stability in Santa Barbara County by creating partnerships and programs that help our community.

Key Messages
- United Way is local. 100% of your gift to United Way stays in our county.
- United Way focuses on improving education, health, and financial stability.
- United Way has decades of expertise in identifying and responding to community challenges.

Why give to United Way?
Through direct services, programs, funding, volunteer development, and leveraging local partnerships, United Way creates lasting, meaningful solutions to community problems. United Way's approach engages the entire community and addresses multi-faceted issues with best-in-class programs and services.

Will my gift stay in my community?
Yes! 100% of donations given directly to United Way of Santa Barbara County support local programs and services.

CAMPAIGN TOOLKIT

Visit UNITEDWAYSB.ORG/CAMPAIGN-TOOLKIT to access:

- Volunteer Resources
- FAQ
- Marketing Materials
- Impact Results
- Annual Impact Report
- Finance Forms
- Special Event/Incentive Ideas
- Pledge Form
- Videos
- Other campaign resources

STEPS TO SUCCESS

1. Build your team
- Assemble a team of volunteers and set roles/responsibilities
- Get CEO/management support for the campaign

2. Set your timeline
- Pick your campaign dates and schedule
- Start planning at least 6-8 weeks before the kickoff

3. Set your goal
- Determine your campaign goal ($, participation, etc.)

4. Plan your campaign logistics
- Determine your budget
- Use incentives and consider special events (bake sale, raffle, etc.)
- Set dates and times for meetings, presentations, and events
- Create a communication plan for your campaign

5. Schedule United Way presentations
- Invite United Way staff to share information to employees about United Way programs and results

6. Promote your campaign
- Publicise the campaign before it starts using flyers, posters, emails, newsletters, staff meeting announcments, etc.

7. Host a fun, inclusive kick-off event
- Invite employees to a campaign kickoff featuring food, a raffle drawing, an activity, volunteer project, etc.

8. Recognize leadership donors, new donors, etc.
- Consider a special event for leadership donors ($1,000+)
- Publicly recognize new donors and leadership donors

9. Follow up with employees during the campaign
- Ensure every employee has the opporunity to give
- Create a follow up plan to remind employees and give deadlines!

10. Thank employees and celebrate success!