



EMPLOYEE CAMPAIGN COORDINATOR GUIDE

A GUIDE TO PLANNING YOUR 2021 CAMPAIGN



Thank you for being an EMPLOYEE CAMPAIGN COORDINATOR!



Thank you for agreeing to serve as your company's Employee Campaign Coordinator (ECC). With your leadership in designing and running your company's United Way of Abilene campaign, you will touch hundreds of lives. Remember that our staff, Loaned Executives, and Campaign Cabinet will support you here every step of the way.

Your commitment and hard work will make a significant impact in the lives of children and families who are served by our Community Partners. Without you, the work of United Way and these partners would not be possible. Thank you again for being a part of our team and a champion for our community. We look forward to working alongside you to make your campaign a success this year.

Sincerely,

A handwritten signature in black ink that reads "Cathy Ashby".

Cathy Ashby
President/CEO
United Way of Abilene

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KEY DATES

Pacesetter

Through August 31

Campaign Kickoff

September 10

Mid-Campaign Report

TBD

Annual Meeting

February 9, 2021

A message from our CAMPAIGN CHAIRS

Your willingness to give, volunteer, and advocate for positive change in Abilene is inspiring! As an Employee Campaign Coordinator (ECC), you have the opportunity to harness the generosity, talent, and energy of your workplace to give back to the community and help United Way's efforts to change stories. Without the power of ECC's like you, United Way would be unable to duplicate the passion, community ownership, and production that you will undertake this year. With that said, we would like to say "welcome!"

As part of your company's United Way campaign team, you'll educate your peers about United Way and inspire them to invest in this important cause. Inside this guide, you'll find several tips to help you make a big difference. As you learn more about your role, your responsibilities, and the role of United Way in our community, we hope that we may be a resource of support for you as you need it.

We are proud to work alongside you as – together – we will do good in our community.

Brad Holland, Megan Allred, David Young, EdD
2021 Campaign Chairs

ECC ROLE

- Engage co-workers in building a stronger community by planning, organizing, and coordinating a successful United Way campaign
- Work closely with your organization's leadership
- Work closely with your Loaned Executive (LE)
- Develop an effective campaign plan
- Recruit a team to assist you (if needed)
- Hold campaign kickoff and recognition events
- Promote the campaign within your organization
- Educate co-workers about United Way
- Encourage leadership giving
- Make your campaign fun!
- Thank your donors and volunteers

ECC OF THE YEAR

United Way of Abilene awards the ECC of the Year award to an ECC or campaign team that demonstrates extraordinary leadership, initiative, and management during their organization's United Way campaign. Areas such as increasing awareness, participation, and outreach are considered for the award which is presented at the United Way of Abilene Annual Meeting in February.



2019 ECC of the Year
John Bittrick
Dillard's Department Stores

ABOUT YOUR UNITED WAY

MISSION & VISION

The mission of the United Way of Abilene is to **improve lives** by mobilizing the caring power of the West Central Texas area. We will do this by actively seeking to leverage the intellectual, organizational, institutional, financial, faith-based and personal resources of our communities as the best means to make positive, measurable and lasting change for the communities we serve.

United Way of Abilene will focus community resources and partners to leverage services for positive impact on individuals, families and neighborhoods. Through the collaborative efforts of our entire community, we envision a West Central Texas:

- where basic human needs are met for all citizens;
- where our students complete high school and are prepared for work or higher education;
- where our senior adults live independently and stay connected;
- where our families are self-sufficient;
- where our neighborhoods are safe and family-friendly.

HOW WILL WE DO THIS?

By collaborating with individuals and companies across all sectors, we are able to leverage resources to accomplish our mission to build a stronger community.

Each year, United Way volunteers across the area create relationships with businesses that result in Employee Campaigns and Corporate Gifts. Other volunteers coordinate investments from individuals. Those gifts are pooled in United Way of Abilene's Community Fund.

At the same time as volunteers are raising dollars, another group of volunteers is assessing non-profit programs that are seeking funding. The volunteers are members of the Community Impact Review Teams (CIRT) and Stewardship Teams. CIRT members analyze the outcomes and need for each program, while Stewardship members study the financial stability of applying agencies. The two teams come together to determine how to efficiently and effectively invest dollars raised in the annual campaign.

An investment in United Way is an investment in a diverse portfolio. United Way volunteers ensure that your dollar produces results that improve education, income, and health. This builds a stronger community, which is your return on investment.

WE ARE TRUSTWORTHY & EFFECTIVE

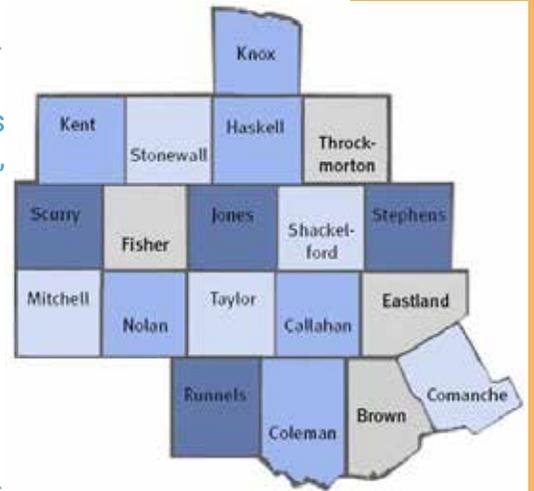
At United Way, we invest in programs that produce results at agencies that manage their finances wisely.

United Way of Abilene maintains the highest standards in community accountability and transparency. United Way of Abilene is recognized as a Gold Participant by GuideStar Exchange and a Four Star Charity by Charity Navigator - their highest rankings.



OUR PARTNERSHIPS

In 2020 United Way of Abilene is **investing \$1.5+ million** through partnerships with local non-profits whose programs address the most pressing community needs. Community Partners receiving investment must focus their programs and work on the building blocks for a good life: Education, Income, and Health. Our programs provide individuals and families in the 19 counties of West Central Texas with opportunities to Learn Well, Earn Well, and Live Well. United Way of Abilene has invested more than **\$57 million** in community programs in the organization's 63 year history. United Way of Abilene volunteers determine how to best invest gifts made to the United Way Annual Campaign. Through in-depth research and vetting, these volunteers determine which programs can best address our focus areas. The volunteer review process ensures that United Way invests only in programs that produce positive results through agencies that are fiscally responsible.



2020 COMMUNITY PARTNERS

- Abilene Hope Haven
- Adaptive Recreation Services
- Adult Protective Services Partners
- Alliance for Women & Children
- Alzheimer's Association
- American Red Cross
- Ben Richey Boys Ranch
- Big Brothers Big Sisters
- Big Country CASA
- Boy Scouts - Texas Trails Council
- Boys & Girls Club
- Cancer Services Network
- Center for Contemporary Arts
- Christian Service Center
- Communities in Schools
- Day Nursery of Abilene
- Dyess Youth Programs
- FaithWorks
- Girl Scouts - Texas Oklahoma Plains
- MERCY Health Care Center
- New Beginnings
- Noah Project
- Presbyterian Medical Care Mission
- Regional Victim Crisis Center
- ResourceCare
- Southwestern Diabetic Foundation
- Strength for Life
- YMCA of Abilene

2-1-1 Texas A Call for Help Community Resource Center is a public/private collaboration of United Way of Abilene, the City of Abilene, and the Texas Health & Human Services Commission. The number one commitment at A Call for Help is to answer 2-1-1 calls providing quality information and referral for all callers. 2-1-1 provides One Call for Help and Hope.



In 2019, 2-1-1 Texas A Call for Help handled 30,000+ calls.

QUICK FACTS

\$1.5 MILLION INVESTED • **26 COMMUNITY PARTNERS** • **31 FUNDED PROGRAMS**

CAMPAIGN CHECKLIST

Check out campaign resources at unitedwayabilene.org

Plan your Campaign		Target Date
	Attend ECC Training	
	Review the previous campaign's performance. Determine opportunities and challenges.	
	Meet with your CEO. Determine your participation, goals, incentives, and get his/her personal endorsement.	
	Recruit a Co-ECC or Planning Committee (if needed)	
	Meet with your Loaned Executive (LE) to discuss your campaign and develop a calendar of events. Typically, a two week campaign works best for most organizations.	
	Request materials and speakers through your LE. Check out the online toolkit for campaign materials.	
	Send a "Campaign Kickoff" letter or email from your CEO endorsing and announcing the upcoming campaign.	
	Promote your campaign and distribute your event calendar.	
Execute Your Campaign		
	Hold a Kickoff Event with your LE and an agency speaker. Be creative!	
	Acknowledge your Loyal Contributors who have given 10 years or more.	
	Hold a Leadership Giving, Retiree, or Loyal Contributor event.	
	Conduct special events, projects, Lunch & Learns, or other activities. Share photos!	
	Make sure each employee receives a pledge form and has the opportunity to give.	
	Publicize United Way facts and interim campaign results. United Way can provide you with a thermometer poster to report your results internally.	
Finalize Your Campaign		
	Collect pledges, calculate results, and submit final report envelopes to your LE.	
	Review campaign results with your committee members and LE.	
	Announce results to all employees.	
	Thank all donors with a celebration event, letter/email from CEO, or note from the committee.	

RESOURCES

Online

unitedwayabilene.org

Social Media

Facebook
Twitter
Instagram
YouTube

Videos

Find videos on our website and YouTube channel.

Speakers Bureau

Agency and volunteer speakers are available to speak at your campaign meeting. Ask your LE or United Way staff to schedule a speaker for your meeting.

Fairs and Tours

We can arrange on-site group tours of agencies or coordinate agency fairs at your organization.

WHAT'S A LOANED EXECUTIVE?

Loaned Executives (LE) are area professionals loaned by local businesses and organizations to help with the annual United Way campaign. They are here to help you with materials, strategies, organizing speakers, and any additional support needed.



TIPS FOR SUCCESS

Get Donors Interested

- **Share the story:** Educate employees by inviting an agency speaker to share a story about the positive impact that donor dollars have on our community. Contact your LE or United Way staff to schedule a speaker.
- **See impact in action:** Experience how important United Way funded partners are to the community by touring an agency.

Make the Ask

- **Ask for a pledge:** Research shows that the #1 reason people don't give to United Way is because they were never asked. With new donors, ask for a first-time gift. For annual donors, thank them for their past support and encourage an increase.
- **Answer questions and handle concerns:** Answer questions honestly and if you don't know the answer ask your United Way representative.
- **Leverage incentives:** Employee prizes and incentives are a way to reward employees for participation. No prize is too small! Vacation days, VIP parking, and gift cards are great incentives.
- **Say thank you:** Regardless of what the donor decides, thank them for their time.

Only Have 60 Seconds?

Be an Advocate

- United Way recruits people and organizations who bring passion, expertise, and resources needed to get things done.
- Giving to United Way is the most efficient and powerful way for you to invest in our community. Money raised in Abilene stays in Abilene.
- United Way is not a short-term investment; it's about lasting change. We surround our community's most critical problems and invest in programs that create solutions.

United Way is

- **Effective.** We only invest in programs at agencies that are in good financial health and in programs with results that are measurable, sustainable, and address community needs.
- **Efficient.** Donor dollars are leveraged with others to meet the most pressing needs.
- **Local.** We invest in 29 programs at 24 local agencies in the areas of Education, Financial Stability, and Health in the 19 counties of West Central Texas.

CORPORATE RECOGNITION

Companies giving a corporate gift and/or running an employee workplace campaign of \$10,000 or more will receive a billboard thank you:

- Each company is featured for one week on a high visibility digital billboards in Abilene.
- During that week, your company's name will appear 2,500+ times on digital billboards.



AWARDS & RECOGNITION

United Way of Abilene wants to recognize organizations and individuals for outstanding giving and participation. Below is an outline of our criteria.

The Groundbreaker and Cornerstone Awards will be presented to qualifying companies at United Way of Abilene kickoff and mid-campaign events. Worksites and campuses with 10 or more employees are eligible to receive Cornerstone Awards.

Groundbreaker Award: Presented to a company completing a first-time employee or re-established campaign.

Cornerstone Award: Presented to a company achieving a 20% or higher increase in employee giving.

The following awards will be presented to qualifying companies and individuals at the United Way of Abilene Annual Meeting:

Rising Star of the Year: Awarded to the company that has shown the greatest overall improvement in conducting their employee campaign. In addition to having the greatest increase in the total amount of money raised for United Way of Abilene, the campaign leaders demonstrated an exceptional commitment to encouraging employee giving.

Small Campaign of the Year Award: Awarded to the company with less than 25 employees that demonstrated exceptional leadership and commitment to the mission of United Way of Abilene during the campaign. Winner is based on total percentage of employees giving to the campaign and a minimum of 5% increase in the total dollar amount raised.

Mid-Size Campaign of the Year Award: Awarded to the company with 26 – 99 employees that demonstrated exceptional leadership and commitment to the mission of United Way of Abilene during the campaign. Winner is based on total percentage of employees giving to the campaign and a minimum 5% increase in the total dollar amount raised.

Large Campaign of the Year Award: Awarded to the company with 100+ employees that demonstrated exceptional leadership and commitment to the mission of United Way of Abilene during the campaign. Winner is based on total percentage of employees giving to the campaign and a minimum 5% increase in the total dollar amount raised.

Community Partner Campaign of the Year: Awarded to the United Way of Abilene Community Partner Agency that demonstrated exceptional leadership and commitment to the mission of United Way of Abilene during the campaign. Winner is based on campaign activity, exceptional commitment to encouraging employee giving, and a minimum 5% increase in total dollar amount raised.

Employee Giving Award: Awarded to the company with the highest percentage increase in employee giving. The award is one of the highest honors a company can receive.

Employee Campaign Coordinator of the Year Award: Presented to the employee campaign coordinator or campaign team that demonstrates extraordinary leadership, initiative, and management during their company's United Way campaign. Areas such as increasing awareness, participation, and outreach are considered. Eligible individuals and teams nominated by Loaned Executives and campaign leadership.

Loaned Executive of the Year: Presented to the Loaned Executive who demonstrated outstanding leadership, initiative, and participation in their assigned company campaigns. Winner nominated by Loaned Executive peers and campaign leadership.

General Award Information:

Campaigns with multiple locations/campuses will be considered based on the enterprise wide participation and contributions of that company. The only exception is the Cornerstone Award. • Percentage increase/decrease is calculated based on information from the United Way of Abilene database. Performance is based on the overall change from previous year's campaign totals. Campaigns are not eligible for a campaign award (except Groundbreaker) if the workplace was not active in the previous year. Number of employees must be noted on Report Envelope.



FOUNDATION & SOCIETIES

UNITED WAY FOUNDATION OF ABILENE

In 2014 the United Way Foundation of Abilene was established to build a permanent, sustainable avenue of support for the future of our area. This avenue of support will generate income to fund the annual operating expenses of United Way of Abilene. In turn, this will allow all campaign dollars to go directly to Community Partner program investments.

Scott Dueser, **Chairman**
Geoff Haney, **Vice Chairman**
Hillary Moore, **Treasurer**
Carolyn Beckham, **Secretary**
Cathy Ashby, **President**

Leroy Bolt
Lee Hampton
Dr. Sara Trammell

LEADERSHIP GIVING SOCIETIES

United Way of Abilene recognizes individuals and couples making investments of \$1,200+ as members of a Leadership Giving Society. Leadership Giving Societies include Alexis de Tocqueville (\$10,000+), Wooten (\$7,500-\$9,999), Swenson (\$5,000-\$7,499), Paramount (\$3,500-\$4,999), Elks (\$2,000-\$2,499), Cypress (\$1,500-\$1,999), and Texas & Pacific (\$1,200-\$1,499).

YOUNG LEADERS SOCIETY

United Way of Abilene's Young Leaders Society exists to connect community members under the age of 40 with opportunities to give back through projects and philanthropy. Young Leaders Society members invest \$250+ (Gold) or \$500+ (Platinum) and receive a variety of benefits, including exclusive opportunities to network with local community leaders.

TOCQUEVILLE LEGACY CIRCLE

The Tocqueville Legacy Circle honors individuals who have made lifetime commitments of \$100,000 or more to United Way of Abilene.



UNITEDWAYGLOSSARY

We know we use a lot of unfamiliar terms and that can be confusing! Here's a breakdown of some terminology you may hear often. If you hear something not outlined here, just ask!

Alexis de Tocqueville Society - A national major gifts society facilitated by United Way Worldwide. Members of the Alexis de Tocqueville Society contribute \$10,000 or more annually.

Campaign - An intensive, time-limited fundraising endeavor to meet a specific financial goal.

Campaign Cabinet - Volunteer division leaders that meet regularly to work on the Annual Campaign.

Combined Federal Campaign (CFC) - The giving campaign for federal government employees, such as individuals who work at the Post Office. This campaign is controlled by federal law and managed independently.

Community Fund - All funds in the Campaign go into the Community Fund. The Community Fund is the best way to help the most people.

Community Impact - The term that United Way uses to describe how United Way uses all available resources to create sustained improvements in community conditions.

Community Partner - The local, non-profit agencies that receive program-specific United Way funds.

Corporate Donation - A donation made by a business (not an employee donation).

Fair Share Giving - Generally, individuals who choose to give either 1% of their annual salary or one hour's pay per month to United Way. Some companies have their own definition of fair share giving.

Leadership Givers - United Way of Abilene donors who give more than \$1,200 a year to the Annual Campaign.

Loaned Executives - Volunteers 'loaned' from area companies to assist United Way with the Annual Campaign. They receive extensive training and are an invaluable resource. They help Campaign Coordinators with workplace campaign activities and meetings, answer questions about United Way, and provide additional resources and supplies to companies as needed.

Loyal Contributor - A donor that has been giving to United Way for 10 years or more. These donors can self-identify on the pledge form.

Speakers Bureau - Volunteer speakers that are available to attend workplace campaign meetings. These trained volunteers include Community Partner staff, community volunteers, and people who have been served by a United Way Community Partner agency.

State Employee Charitable Campaign (SECC) - A separate workplace campaign for state workplaces such as Texas Tech and Texas Department of Transportation. SECC campaigns are regulated and managed separately.

Young Leaders Society - Young Leaders are compassionate and committed individuals on a mission to encourage philanthropy and volunteerism in our community. Individuals can gain membership into the Young Leaders Society through a gift of \$250 or more.