



EMPLOYEE CAMPAIGN COORDINATOR HANDBOOK

GREAT THINGS HAPPEN WHEN WE CHOOSE TO LIVE UNITED



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WHAT IS AN EMPLOYEE CAMPAIGN COORDINATOR

Employee Campaign Coordinators (ECC) are key to the success of every workplace fundraising campaign. As the ECC, you serve as the connector between Head of the Lakes United Way (HLUW) and the employees of your organization. With the materials and support we provide, you will educate your colleagues about HLUW's vital role in the community and provide them with an opportunity to give, advocate, and volunteer with us. Whether you volunteered or were asked to take on this role, we appreciate you, and we are here to help!

WHAT IS A WORKPLACE CAMPAIGN?

During your organization's workplace campaign, employees make their annual pledge and participate in events to raise funds that support HLUW's work in the community. Lasting from a week to a month, workplace campaigns should be:

FUN

We encourage you to set up events to promote the campaign and bring employees together.

EDUCATIONAL

The most important reason to have a campaign is to raise awareness about HLUW's local impact. Inform colleagues about our work through videos, posters, and speaking events. These items can be located online at hlunitedway.org/campaignmaterials or you can connect with your HLUW contact for assistance.

ENGAGING

Running a workplace campaign not only benefits the community, but it can also improve workplace morale and employee engagement. Providing employees the opportunity to give back at work is becoming increasingly important for employees and job seekers.

THANK YOU!

Your effort and dedication to our work is appreciated more than you know. Remember that HLUW staff are available to help every step of the way. Please don't hesitate to ask!



ABOUT HEAD OF THE LAKES UNITED WAY

WE'RE STRIVING TO IMPROVE THE HEALTH, EDUCATION, AND FINANCIAL STABILITY OF EVERY PERSON IN EVERY COMMUNITY WE SERVE.

OUR COMMUNITY PROGRAMS



United Way 2-1-1 is a FREE service offered 24/7 to anyone seeking information and referrals regarding local resources.

Community Services is a partnership between HLUW and organized labor that supports working families and strengthens our communities.



HEAD OF THE LAKES UNITED WAY
VOLUNTEER CENTER

The HLUW Volunteer Center serves as a "one stop shop" for individuals and groups looking for a volunteer opportunity in our local communities.

Our Community Investment Process provides funding for nearly 70 community programs within the focus areas of health, education and financial stability.



COMMUNITY INVESTMENT PROCESS

GEOGRAPHICAL AREAS AND FOCUS AREAS

WHEN YOU GIVE LOCAL, IT STAYS LOCAL



Ashland and
Bayfield Counties



Greater Duluth Area



Lake and Cook
Counties



Superior-
Douglas County

Head of the Lakes United Way's service area encompasses the geographical boundaries of Greater Duluth (Duluth, Hermantown, Proctor, Rice Lake, and the townships of Duluth, Solway, Grand Lake, Fredenberg, Gnesen, Normanna, Canosia, Lakewood, and Midway) as well as the North Shore of Minnesota (Lake and Cook Counties).

In 2015, as the result of a merger between the United Ways of Superior-Douglas County and Greater Duluth, the area expanded to include Superior-Douglas County as well as Ashland and Bayfield Counties.

FOCUS AREAS

ACCESS TO HEALTH

We make it easier for individuals to access substance abuse programs, receive quality health care, and access nutritious foods, we're striving to help everyone get—and stay—healthy.

EDUCATION

We're seeking to shift the odds so tomorrow's leaders can build a better foundation today. With an approach to education that spans from cradle to career, we're ensuring that: every child gets a strong start in life, teenagers have the tools to learn and grow, and young adults thrive in the job market.

FINANCIAL STABILITY

We're striving to put every person, in every community, on a path toward financial empowerment. That starts with access to housing, job training, credit counseling, and money management programs.



EASY STEPS FOR FUNDRAISING CAMPAIGN SUCCESS

1

DEFINE INTERNAL ROLES AND RESPONSIBILITIES

- Recruit a team to help you run your workplace campaign
- Diversity is important – include people from various departments and backgrounds

2

NAIL DOWN LOGISTICS

- Determine your timeline (1-2 weeks works well for most workplace campaigns)

When will you start your campaign? _____

When will you end your campaign? _____

3

SET A CHALLENGING AND ATTAINABLE GOAL

- Review past campaign giving history. What areas of giving can be extended or increased? Are there ways to become more engaged?
- Identify growth potential in all types of giving
 - employee
 - corporate
 - special events
 - leadership
 - sponsorships
 - and volunteer involvement

What is your campaign goal? _____

4

PLAN YOUR EMPLOYEE CAMPAIGN ACTIVITIES

- Hold special events
- Incorporate into training/meetings (safety meetings, staff meetings, etc.)
- Participate in volunteer projects
- Consider holding competitions between departments or locations
- Offer incentives and/or prizes

When will these activities take place? _____



5 ORGANIZE TARGETED GROUP ACTIVITIES

- Invite upper management and organization leaders
- Inform attendees about the Lake Superior Leadership Society
- Include a retiree campaign

6 COMMUNICATE AND PUBLICIZE THE CAMPAIGN

- Email and personalized letters
- Posters in common areas
- Incentives and prizes
- Presentations: HLUW campaign staff are available to present
- Share HLUW materials (infographic, posters, campaign video, pledge forms, and more!)

What will you use during your campaign? _____

7 THANK YOUR DONORS AND EMPLOYEES

- To ensure employees have a positive experience and continue to donate, thank them throughout the entire campaign - beginning, middle, and end.

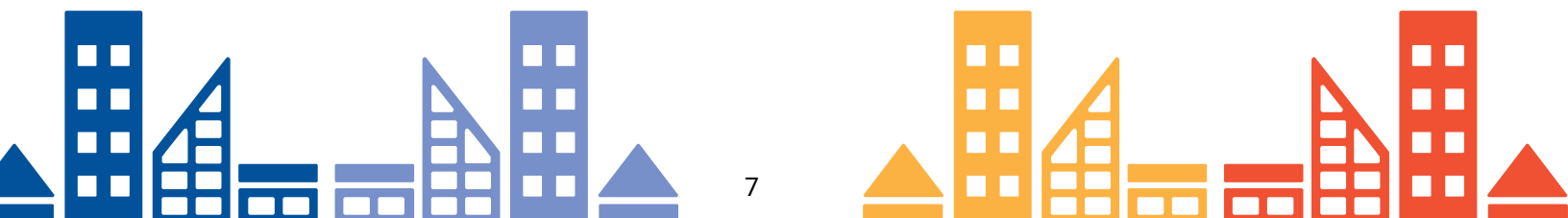
How will you thank your donors and employees? _____

8 EMPLOYEE CAMPAIGN WRAP-UP

To report campaign results:

1. Complete the front of the envelope
 - a. Record the total number of employees and donors.
 - b. Be sure to calculate the total for all employee and corporate gifts and special events.
2. Seal the envelope with pledge forms and payments inside.
 - a. Make sure each donor signed their pledge form.
 - b. Ensure designation and credit card forms are attached to pledge forms, as indicated by the donor.
3. Give pledge forms to your payroll department.
4. Deliver to HLUW or call for pick-up.

When will you turn your results in to HLUW? _____



INSPIRE. ASK. THANK.

INSPIRE.

Prior to your organization's campaign kickoff, send emails to employees to educate and motivate them to give. Include a message from your President or CEO, or consider hosting a company-wide event with presentations and CEO appearances.

As the Employee Campaign Coordinator (ECC), you can help your colleagues understand the importance of their gifts. Visit hlunitedway.org/campaignmaterials to find items to help inspire your team, including:

- Videos
- Posters
- Campaign Infographic
- Sample letters and emails

You can share this information during presentations and via your employee communications such as email, announcements, bulletin boards, management endorsement letters, newsletters, and social media.

Be sure to encourage colleagues to follow HLUW on Facebook and LinkedIn to stay updated throughout the rest of the year!

ASK.

The #1 reason people do not give is they are not asked. So please ask everyone. We believe that giving is a personal decision. Make sure that everyone has the opportunity to learn about how HLUW changes lives and how each contribution drives our mission forward. Remember to include off-site employees and highlight corporate matched donations when available

THANK.

Thank all those who participate at every step along the way.

Thank employees individually for their participation, time, and support.

- Recognize your team and others who volunteered their time.
- Publicize your results via email, newsletters, social media, etc.
- Celebrate your success!

Recognition opportunities through HLUW:

- Big check presentations and other social media recognition through HLUW
- Invite employee donors to attend our celebration in January

WRAPPING UP THE CAMPAIGN



HLW PLEDGE FORMS

When wrapping up your campaign, please ensure a pledge form is completed for each donor, including their contact information, donation information, and signature/date. Attach cash, checks, credit card, or designation forms as needed.

Additional forms can be downloaded at hlunitedway.org/campaignmaterials

HEAD OF THE LAKES UNITED WAY PLEDGE FORM

424 W. Superior Street, Suite 402, Duluth, MN 55802
Duluth: 218-726-4779 / Superior: 715-394-2732 | www.hlundedway.org

STEP 1 DONOR INFORMATION: ☐ Check here if your contact info has recently changed

Profile: First Name _____ MI _____ Last Name _____ Suffix _____
Home Address _____ City _____ State _____ Zip _____
☐ I am Retired ☐ I am an Employer ☐ I am a Union Member of _____
Please provide your preferred phone number and email address so that we may contact you if we have questions regarding your pledge.
Phone: ☐ Home ☐ Office ☐ Cell ☐ Work ☐ Fax ☐ Other _____
Email: _____

STEP 2 CHOOSE YOUR GEOGRAPHIC AREA*:
☐ Ashland - Bayfield Counties ☐ Greater Duluth ☐ North Shore (Lake & Cook Counties) ☐ Superior - Douglas County

STEP 3 MAKE YOUR PLEDGE: TOTAL Annual Contribution: \$ _____ Indicate payment method below:

☐ PAYROLL DEDUCTION: I want to donate the following amount per pay period:
\$10 \$25 \$50 \$100 \$500
My pay period is: ☐ Monthly (12 per year) ☐ Quarterly ☐ Twice a month (24 per year) ☐ Every other week (26 per year) ☐ Other _____

☐ BILL ME: Please send me an invoice: \$ _____ (\$15 minimum)
My pay period is: ☐ Quarterly ☐ One Time only

☐ DIRECT GIFT: ☐ Cash \$ _____ ☐ Check \$ _____
One-time or recurring CC charge: ☐ My credit card form is attached ☐ I'll give securely online at: www.hlundedway.org/donate
Please contact me: _____

☐ CREDIT CARD: *Credit card forms and additional information about online giving can be found at www.hlundedway.org/donate

LAKE SUPERIOR LEADERSHIP SOCIETY
An individual or combined gift of \$1,000 or more qualifies you as a Lake Superior Leadership Society Member! In addition, the Emerging Leaders program recognizes donors that give \$500 with a commitment of increasing their gift to \$1,000 within 3 years.
SELECT YOUR LEVEL: ☐ Emerging Leader (\$500+) ☐ Visionary (\$3,500-\$4,999) ☐ Friend (\$1,000-\$1,999) ☐ Innovator (\$5,000-\$9,999) ☐ Pacesetter (\$2,000-\$3,499) ☐ Trailblazer (\$10,000 & above)
Combined Gift with _____ Employer _____
Recognition: ** _____
Please use this as major names in United Way publications. ** I do wish to remain anonymous.

STEP 4 REQUIRED SIGNATURE ☐ By typing my name and date below, I agree to the following pledge amount as listed above.
Signature: _____ Date: _____

ADDITIONAL INFO: (OPTIONAL)
AGE RANGE: ☐ 18-24 ☐ 25-34 ☐ 35-44 ☐ 45-54 ☐ 55-64 ☐ 65-74 ☐ 75 & older
☐ I am a NEWBIE ☐ I am a RETURNING MEMBER
Please contact me regarding PLANNED GIVING: _____
PLEASE ADD ME TO THE HLW EMAIL LIST: ☐ General Head of the Lakes HLW e-news ☐ Volunteer Opportunities

Thank you for your contribution to the United Way campaign. No contribution, goods or services have been given to the donor from Head of the Lakes United Way in return for this contribution. If HLW has any questions about your contribution, you will be contacted at the above phone number/email address. *Signatures done if no one is selected, we will apply your gift to the geographic area corresponding to your provided zip code.

THANK YOU FOR YOUR SUPPORT!

HLW CAMPAIGN REPORT ENVELOPE

Once you have all pledge forms verified with appropriate forms attached, put everything into the Campaign Report Envelope and follow the instructions. This information is used by our finance department to ensure all donations are recorded correctly. If you have any questions, please contact your HLW Community Campaign Coordinator.

Head of the Lakes United Way CAMPAIGN REPORT ENVELOPE

To ensure a courtesy, please complete this form as completely as possible.

424 West Superior St., #402
Duluth, MN 55802
Duluth: 218-726-4779
Superior: 715-394-2732
www.hlundedway.org

THIS REPORT IS: ☐ PARTIAL ☐ FINAL

Enclosed in this envelope:
☐ United Way pledge forms - 1 per donor. Cash, checks, credit card forms and/or designation forms are attached as needed. (Go to hlunitedway.org/donate to print additional forms.)
☐ Company/organization pledge card, signed, with pledge indicated and/or donation endorsed.

☐ ASHLAND-BAYFIELD COUNTIES ☐ GREATER DULUTH ☐ NORTH SHORE (Lake & Cook Counties) ☐ SUPERIOR-DOUGLAS COUNTY

STEP 1. COMPANY INFORMATION

Organization name: _____ # Employees: _____
Envelope completed by: _____ Date: _____
Email: _____ Phone: _____

STEP 2. LEADERSHIP SOCIETY DONATION INFORMATION

Please check if there are Lake Superior Leadership Society pledges enclosed (\$1,000 or more). Include these numbers in the employee contribution summary section.
Number of Leadership Donors: _____ Leadership Dollar Amount: \$ _____

STEP 3. PAYMENT SCHEDULE

Payment for the Company/Organization Gift begins _____ and will be paid: ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ One-time

Payment for the Employee Pledge Deduction begins _____ and will be paid: ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ One-time

STEP 4. CONTRIBUTION SUMMARY

	AMOUNT PLEDGED	AMOUNT ENCLOSED
A. COMPANY/ORGANIZATION GIFT	\$ _____	\$ _____
B. WORKPLACE SPECIAL EVENTS	\$ _____	\$ _____
C. TOTAL EMPLOYEE GIFTS	\$ _____	\$ _____
TOTAL ALL GIFTS (A+B+C)	\$ _____	\$ _____

FOR UNITED WAY USE ONLY

	AMOUNT PLEDGED	AMOUNT ENCLOSED
EMPLOYEE CONTRIBUTIONS (with pledge card enclosed)		
Cash	\$ _____	\$ _____
Check	\$ _____	\$ _____
Payroll Deduction	\$ _____	\$ _____
Direct Bill/Securities	\$ _____	\$ _____
Credit Card	\$ _____	\$ _____
Online Giving	\$ _____	\$ _____
TOTAL EMPLOYEE GIFTS	\$ _____	\$ _____
TOTAL ALL GIFTS (A+B+C)	\$ _____	\$ _____

Before submitting this envelope:
☐ Check ALL pledge forms for:
Step 1. Complete donor contact information
Step 2. The Pledge Geographic Area indicated
Step 3. Total annual pledge
Step 4. Pledge form signed and dated
☐ If payment method is "credit card" verify that a credit card form is filled out correctly and attached to the pledge form.
☐ Verify that all checks are made out to United Way.
☐ For Payroll Deduction, give a copy of the completed pledge form to your payroll dept.
☐ Complete the total number of donors and dollar amount for each category.
☐ Verify the total number of people employed by your organization.

Donor's Initials
Date _____
Cash _____
Check _____
Payroll _____
To be billed _____
Credit Card/Online _____
Stock/Securities _____
TOTAL _____

Donor's Initials
Date _____
Cash _____
Check _____
Payroll _____
To be billed _____
Credit Card/Online _____
Stock/Securities _____
TOTAL _____

Grated by HLW: _____
Processed Date: _____
Audit by: _____
Audit by: _____
Audit by: _____



**YOUR COMMITMENT AS AN ECC DOES NOT GO UNNOTICED! IT GIVES US UNWAVERING
HOPE AS WE WORK TOWARDS BUILDING A BETTER FUTURE FOR EVERYONE.
WE APPRECIATE YOU.**



**GIVE.
ADVOCATE.
VOLUNTEER.**

HEAD OF THE LAKES UNITED WAY
424 W Superior St STE 402, Duluth, MN 55802
(218) 726-4770 | www.hlunitedway.org



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