



Head of the Lakes
United Way


HEAD OF THE LAKES UNITED WAY EMPLOYEE CAMPAIGN COORDINATOR HANDBOOK

GREAT THINGS HAPPEN WHEN WE CHOOSE TO LIVE UNITED



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WHAT IS AN EMPLOYEE CAMPAIGN COORDINATOR



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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 and inform your colleagues about our work. Educational Campaign Materials can be located online at hlunitedway.org/campaignmaterials or you can connect with your Campaign Coordinator for assistance.

ENGAGING

Running a workplace campaign doesn't just benefit the community, it also improves workplace morale and employee engagement. Providing employees with the opportunity to give back to the community 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 we are available to help every step of the way. Please don't hesitate to ask!

ABOUT HEAD OF THE LAKES UNITED WAY



Head of the Lakes
United Way

»» MISSION

Our mission is to strengthen our communities by uniting people and resources.

»» VISION

We are striving to improve the health, education, and financial stability of EVERY person in EVERY community we serve.

»» 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.

The HLUW **Volunteer Center** serves as a “one-stop shop” for individuals and groups looking for volunteer opportunities in our communities.



HEAD OF THE LAKES UNITED WAY
VOLUNTEER CENTER



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

Learn more about our programs and initiatives: hlunitedway.org

WHEN YOU GIVE LOCAL, IT STAYS LOCAL.

Head of the Lakes United Way serves **Ashland and Bayfield Counties** and **Superior-Douglas County** in Wisconsin and **Greater Duluth** (Duluth, Hermantown, Proctor, Rice Lake, and the townships of Duluth, Solway, Grand Lake, Fredenberg, Gnesen, Normanna, Canosia, Lakewood, and Midway) and **Lake and Cook Counties** in Minnesota.

»»» AREAS OF FOCUS



HEALTH

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



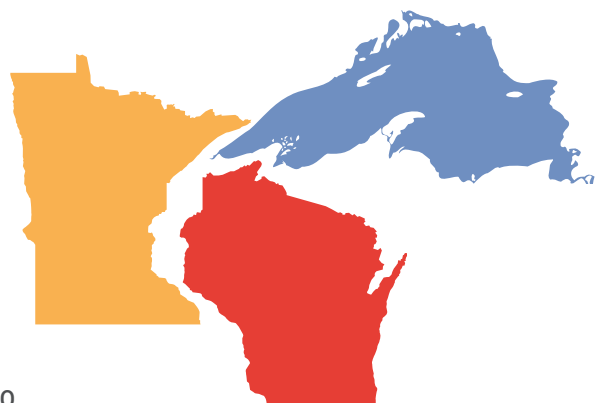
EDUCATION

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.



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.

Who is your team? _____

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?
 - How has your workplace changed?
 - Are there ways to become more engaged?
- Identify growth potential in all types of giving:
 - Employee
 - Corporate
 - Special events
 - Leadership
 - Sponsorship
 - Volunteer involvement

What is your campaign goal? _____

4

PLAN YOUR EMPLOYEE CAMPAIGN ACTIVITIES

- Hold special events such as auctions or potlucks.
- 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

- Personalized emails and letters.
- Posters in common areas.
- Incentives and prizes.
- Presentations by HLUW Campaign Coordinator.
- 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:

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

When will you turn your results in to HLUW? _____

»»» INSPIRE

Prior to your organization's campaign kickoff, send emails to employees to educate and motivate them. Include a message from your President/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:

- Posters
- Infographics
- Campaign Materials

You can share this information during presentations and via 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 organization.

»»» 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 Luncheon.

WRAPPING UP THE CAMPAIGN



Head of the Lakes
United Way

HEAD OF THE LAKES UNITED WAY PLEDGE FORM

424 W. Superior Street, Suite 402 • Duluth, MN 55802
Duluth: 218-726-4770 | Superior: 715-394-2733 | www.huntedway.org

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

Prefix: _____ First Name: _____ MI: _____ Last Name: _____ Suffix: _____
Home Address: _____ City: _____ State: _____ Zip: _____
☐ I am Retired. ☐ 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: _____ Cell: _____ Home: _____ Work: _____
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:**
☐ \$50 ☐ \$25 ☐ \$10 ☐ \$5
Other amount \$ _____
My pay period is:
☐ Weekly (52 per year) ☐ Twice a month (24 per year) ☐ Every other week (26 per year) ☐ Other _____
☐ **BILL ME** Please send me an invoice: \$ _____ (325 maximum)
☐ **DIRECT GIFT** ☐ Cash \$ _____ ☐ Check \$ _____
One-time or recurring CC charge: ☐ One-time ☐ Recurring
My credit card form is attached? ☐ Yes ☐ No
I'll give securely online at: www.huntedway.org/donate
Please contact me: _____
Make checks payable to: ☐ United Way
*Credit card forms and additional information about online giving can be found at www.huntedway.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.
Combined Gift with: _____ Employee: _____
Recognition: " " ☐ We wish to remain anonymous.
Please use this as my/our names in United Way publications

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

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

DESIGNATIONS: If you would like to designate your gift, visit WWW.HUNTEDWAY.ORG/DONATE to view our current partner agencies and fill out/print a designation form. A completed designation form must be attached to your pledge form to be honored.
Original United Way Logo/Logo Copy: Donor/Payor Only

THANK YOU FOR YOUR SUPPORT!

Head of the Lakes United Way CAMPAIGN REPORT ENVELOPE

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

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 huntedway.org to print additional forms.)
☐ Company/organization pledge card, signed, with pledge indicated and/or donation enclosed.

☐ 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 Society 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 Payroll 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		
CASH: \$ _____	\$ _____	\$ _____
CHECK: \$ _____	\$ _____	\$ _____
EMPLOYEE CONTRIBUTIONS (With pledge card enclosed)		
Cash	\$ _____	\$ _____
Check	\$ _____	\$ _____
Payroll Deduction	\$ _____	\$ _____
Direct Bill/Securities	\$ _____	\$ _____
Credit Card	\$ _____	\$ _____
Online Giving	\$ _____	\$ _____
G. TOTAL EMPLOYEE GIFTS	\$ _____	\$ _____
TOTAL ALL GIFTS (A+B+G)	\$ _____	\$ _____

FOR UNITED WAY USE ONLY

Auditor's Initials: _____
Date: _____
Cash: _____
Checks: _____
Payroll: _____
To be billed: _____
Credit Card/Online: _____
Stocks/Securities: _____
TOTAL: _____

Cashier's Initials: _____
Date: _____
Cash: _____
Checks: _____
Payroll: _____
To be billed: _____
Credit Card/Online: _____
Stocks/Securities: _____
TOTAL: _____

Entered by HLW: _____
Processed Date: _____
And/or: ☐ ARPC ☐ GDCR
Donor ID: ☐ SDOR ☐ SDOR
Origin Audit File # _____

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, or designation forms as needed.

Additional forms can be downloaded at:
hluntedway.org/campaignmaterials

HLW CAMPAIGN REPORT ENVELOPE

Once you have all pledge forms verified, with the 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 HLUW Community Campaign Coordinator.

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



**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!**



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