



MESAUNITEDWAY

EMPLOYEE CAMPAIGN LEADER
Training Handbook

MESAUNITEDWAY



Mesa United Way

TO HELP YOU RUN YOUR CAMPAIGN, MESA UNITED WAY IS PROVIDING YOU WITH THIS EMPLOYEE CAMPAIGN LEADER HANDBOOK. WE HOPE THIS WILL SERVE AS A VALUABLE TOOL TO HELP BUILD A SUCCESSFUL CAMPAIGN!

MESAUNITEDWAY

HOW TO GET STARTED.

Mesa United Way believes that the future health and well being of a community is dependent upon the people that live within that community. Since 1921, Mesa United Way has continued to live out its commitment to serve and support the individuals and the families of this community who need it most. Our nation, state, city, businesses, schools, and families have seen the many hands of destruction and loss, but those who UNITE in the calm and in the chaos will lead our communities to a stronger future.

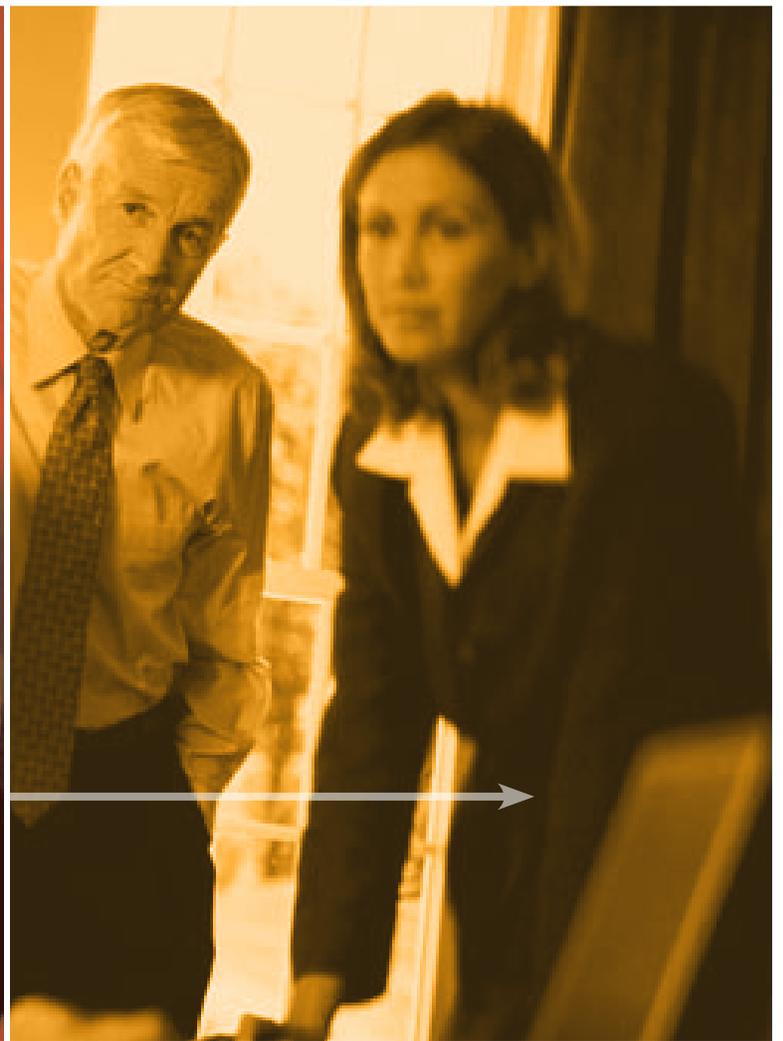
Your role as an Employee Campaign Leader (ECL) is to set the foundation for so many people to start a life towards a stronger tomorrow. We are so grateful for your commitment to UNITE with Mesa United Way and serve the community. We cannot do this on our own, and we want you to know, how much we value your support and willingness to assist us in meeting the needs of our community.

This Employee Campaign Leader Handbook is a resource to assist you in running a successful Workplace Campaign. It is our goal to assist you in any way that we are able, so please do not hesitate to reach out to your Mesa United Way representatives. Additional campaign materials can be located on our website: www.mesaunitedway.org

[UNITE]

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8 STEPS TO A SUCCESSFUL CAMPAIGN!

CONTACT YOUR MESA UNITED WAY DEVELOPMENT STAFF OR LOANED EXECUTIVE

1

LET US KNOW HOW WE CAN:

- Provide campaign materials, information and support.
- Help you plan and implement your campaign.

YOU CAN:

- Schedule presentations during your employee meetings.
- Attend an Employee Campaign Leader training session.
- Read the Employee Campaign Leader Training Manual and visit www.mesaunitedway.org for additional campaign resources.
- Learn about your organization's best practices for running a campaign.
- Become familiar with your company's online pledge form and tracking process (if applicable).

ENLIST SUPPORT

2

Ask your CEO and senior management personnel for their personal commitment, and encourage them to endorse the campaign at employee events.

- Ask all managers to include campaign presentations in their staff meetings.
- Ask management to consider a company match to employee gifts.

Analyze past campaigns and have management endorse a goal that reflects growth in:

- Employee participation rates
- Overall dollars raised
- Average gift amount

Recruit a campaign team. Select key people from all employee groups.

Look for people who:

- relate well to fellow employees, already support the campaign
- will participate enthusiastically.

DEVELOP A CAMPAIGN PLAN!

3

- create a timetable for the campaign.
- choose fundraising strategies that are tailored to your corporate culture.
- consider providing incentives that may increase participation (see page 10 for ideas).
- include a leadership giving program that focuses on donors with gifts of \$500 or more.

8 STEPS TO A SUCCESSFUL CAMPAIGN

PROMOTE YOUR CAMPAIGN

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Use Mesa United Way brochures, handouts, and posters to build awareness of the campaign (MUW will provide these at no cost to your company or organization).

Provide employees with updates about the progress of your campaign.

- Feature information about the campaign in newsletters, on bulletin boards, in emails, and through other venues available in your organization.
- Explain how people can participate in campaign activities.
- Inform employees of campaign start and ends dates and where they can return pledge forms.

Schedule a meeting with your employees and allow your Mesa United Way Development Staff or Loaned Executive to present and inform your workplace about the impact of their support through Mesa United Way.

- You do not need a separate meeting. Allow for 10-15 minutes at the beginning or end of an existing meeting.

IMPLEMENT YOUR CAMPAIGN

5

Schedule a short, intensive campaign. Two-week campaigns have proven to be the most effective, as they keep the momentum and enthusiasm high.

Make sure every employee is given the opportunity to donate, including employees who are part-time, temporary, travel or work off-site.

Personally deliver the pledge forms to employees and ask for their support. Find additional campaign materials at www.mesaunitedway.org. Click on the CAMPAIGN tab and access the following information:

- Organize a Workplace Campaign
- A Model Workplace Campaign
- Campaign Toolkit
- Loaned Executive Program

EDUCATE YOUR EMPLOYEES ABOUT MESA UNITED WAY

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Visit our Website
www.mesaunitedway.org:



The GIVE tab will provide you with the following links:

Arizona's Charitable Tax Credit
Leadership Giving Information
Legacy Giving Information
Memorial Giving



UNITED WAY VIDEOS AND
MESA UNITED WAY CAM-
PAIGN VIDEOS:

Mesa United Way's campaign video is available and is a great addition to your meetings. You can access campaign videos on our MUW website.

SPEAKERS:

Agency representatives and Mesa United Way volunteers are available to speak at your organization and are eager to share their stories. A short presentation by one of these speakers will personalize your employee meeting.

TOURS:

Motivate employees to give by providing a firsthand look at how contributions make a difference in our community. Tours of Mesa United Way agencies significantly impact the results of an employee campaign. They usually last about thirty minutes including travel time per agency, and can be arranged to accommodate your employees' schedules. Most groups visit two or three agencies.

**EMPLOYEE
TESTIMONIALS:**

Share stories of how employees, their friends, or their family members have benefited from Mesa United Way. These stories can inspire co-workers to donate.

CONDUCT A THOROUGH CAMPAIGN WRAP-UP

7

It is very important to report your results to Mesa United Way as soon as possible following the completion of your campaign.

Collect all pledge forms and make sure:

- Donors have kept their copy, and that the forms are signed
- Credit card payments show an expiration date and billing address
- All payroll deduction cards are brought to your payroll office
- Summarize all campaign information on the Report Envelope. Enclose checks, copies of all pledge forms and note the employee count on the front of the envelope.
- If pledges are completed online and/or pledge forms are not turned in, please provide Mesa United Way with as much campaign information as possible. A list of Leadership Givers and Leadership Levels should be included in your campaign wrap-up.
- **IMPORTANT:** Call your Mesa United Way Development Staff or Loaned Executive to schedule a time to audit and pick up your Report Envelope.
- Report the final totals to your fellow employees.

THANK YOUR SUPPORTERS SEVEN TIMES

8

Thank those who volunteered and those who gave. Make sure donors know how much we appreciate them and their generosity.

Gratitude doesn't have to be elaborate or expensive—just sincere. Saying thank you 7 times shows donors that you haven't forgotten about them and it helps build relationships. You can even spread it out over several weeks or months.

IDEAS FOR SEVEN THANK YOU'S.

- 1 Hold a thank you event for employees
- 2 Send a thank you letter from the CEO to the employees
- 3 Send personalized thank you notes and cards, or post personalized posters
- 4 Put together goodie bags to thank your committee
- 5 Arrange a call or visit from the CEO
- 6 Arrange a call or note from a MUW Board Member
- 7 Send a note from a client of an agency

CAMPAIGN TIME-LINE

PRIOR TO CAMPAIGN

CEO or Senior management enlists an employee volunteer(s) to lead the Workplace and Leadership Giving Campaigns.

The employee volunteer attends the Employee Campaign Leader training and a meet and greet with Mesa United Way Development Staff and Loaned Executive.

The ECL reviews previous campaign results and establish a campaign goal and strategies with Mesa United Way Development Staff or Loaned Executive.

The CEO or identified Senior leader will send a campaign announcement (letter or email) explaining the importance of their personal commitment to Mesa United Way and the community. The ECL will send out a second letter or email with a campaign reminder of pertinent dates, events, campaign goal, etc...



CAMPAIGN-IN-PROCESS

Kick-off event to inspire excitement around the campaign

Presentations are conducted to educate employees about Mesa United Way and their initiatives. This is a great opportunity to ask for a commitment to donate by filing out a pledge form to Mesa United Way. Promote your campaign with a special event fundraiser (e.g. raffle, bake sale, a pot luck lunch). This can help increase your campaigns total funds raised or maybe break previous years goals!

WRAPPING UP A CAMPAIGN

All pledge forms are completed in full and check and credit card pledges are verified and turned into the ECL. The ECL completes a Mesa United Way Report Envelope filling in all pertinent information. Please be certain to include an up-to-date total employee count! This is used to determine award levels at the end of a campaign.

A meeting is scheduled with your Mesa United Way Staff or Loaned Executive to audit and pick up the campaign envelope.

Mesa United Way Development Staff sends a letter or email to CEO or Senior Leader congratulating and thanking all employees for their commitment to the campaign and community.

A campaign Wrap-up Event shows appreciation from the CEO or Senior Management to employees for their commitment to the community and the campaign.

MESA UNITED WAY MESA UNITES FUND

The Mesa Unites fund is an effective way for your dollars to address our community's most pressing needs. It takes a wide variety of caring organizations working together to successfully address complex community needs. Many people require the help of more than one type of service and the Mesa United Way Mesa Unites fund helps make a full range of services available to those who need it. Mesa Unites Fund dollars are strategically allocated to critical programs providing basic needs, education, health and self-reliance services.

MESA UNITED WAY'S MESA UNITES FUND ENSURES:

Mesa Unites to Fight Hunger

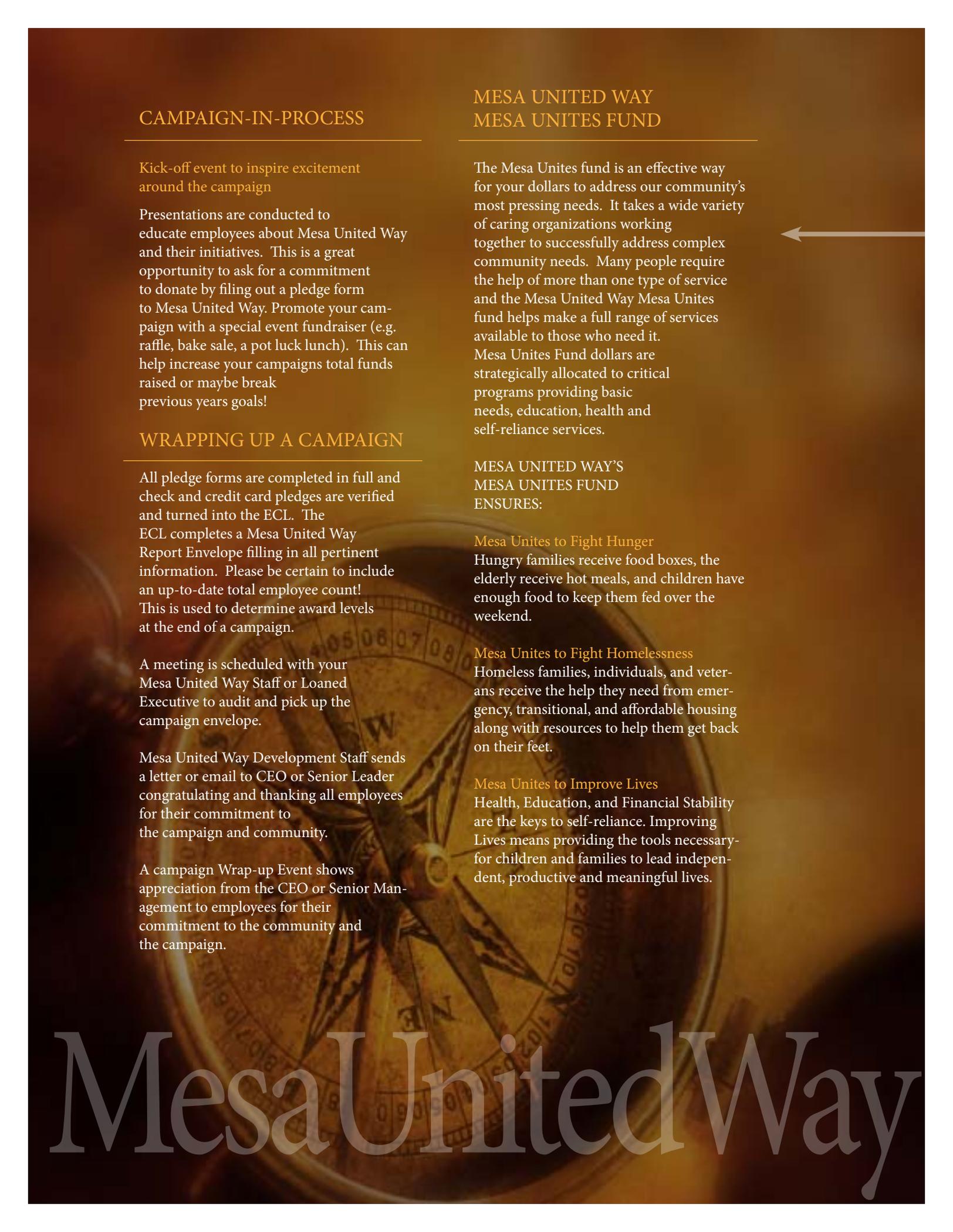
Hungry families receive food boxes, the elderly receive hot meals, and children have enough food to keep them fed over the weekend.

Mesa Unites to Fight Homelessness

Homeless families, individuals, and veterans receive the help they need from emergency, transitional, and affordable housing along with resources to help them get back on their feet.

Mesa Unites to Improve Lives

Health, Education, and Financial Stability are the keys to self-reliance. Improving Lives means providing the tools necessary for children and families to lead independent, productive and meaningful lives.



Mesa United Way

AWARDS AND RECOGNITION

TRAILBLAZER AWARD

The Trailblazer Award is designated for companies that run a workplace campaign. There are 3 criteria:

- \$75 per capita (total giving/total employees)
- 60% employee participation rate
- \$150.00 average gift
- A company can earn the following levels of achievement:

GOLD: the company must meet all three criteria

SILVER: the company must meet at least two criteria

BRONZE: the company must meet at least one criterion

COMMUNITY PARTNERSHIP AWARD

One or more organizations are presented with the Community Partnership Award for their significant efforts in improving the quality of life in Mesa.

RISING STAR AWARD

The Rising Star Award is presented to a new or existing agency that demonstrates the following:

Takes additional steps to lend support other than the traditional campaign such as volunteering, donation drives, and Community Investment Panel participation

Demonstrates ownership and commitment to improving the community

Develops innovative and creative ideas to boost campaign dollars and participation Exceeds campaign goal

AGENCY OF THE YEAR AWARD

The Agency of the Year Award is given to one non-profit agency that has demonstrated the following:

Have a campaign with exceptional employee participation

Have a campaign that promotes and encourages donations to the Community Chest

ECL OF THE YEAR AWARD

This award recognizes outstanding Employee Campaign Leaders.

The ECL must meet at least 5 or more of the criteria:

- Attend ECL training
- Organize United Way presentations/employee meetings
- Promote Leadership Giving
- Increase total dollars raised from previous year by at least 10%
- Use innovative ideas and strategies during the campaign
- Acquire incentives for their campaign

HEART OF MESA AWARD

The recipient of the Heart of Mesa Award exemplifies the commitment to serving the children, seniors, families, and neighborhoods that most need help, ensuring the greatest positive impact upon the needs of our community.

A company/organization must achieve all the following:

At least 80% of employee contributions are given to Mesa United Way or one of the focus areas

The amount of employee gifts to Mesa United Way has increased from the previous year

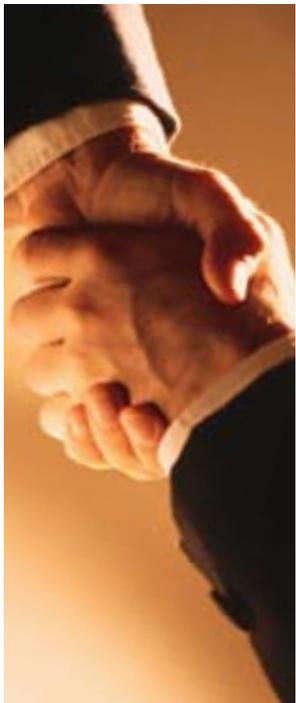
Per capita contributions must be at least \$100

100% of the corporate gift (if applicable) is contributed to Mesa United Way's Community Chest

The corporate gift has increased from the previous year

The CEO has contributed a gift to Mesa United Way, or one of the focus areas, at a Leadership Giving level (a minimum of \$500)

The amount of employee participation on Mesa United Way volunteer committees





ENGAGING AND EXCITING CAMPAIGN

Here are some ideas to create a little excitement around giving. Think about tailoring your campaign and events around a particular theme such as sports, super heroes, inspirational slogans or quotes, a specific era in history, or cultural influence. Be creative and make it fun! Remember, your Mesa United Way Development Staff and Loaned Executives are always here to help!

Fundraisers

Jeans day	Chili Cook-off / Salsa Contest
Bake Sale	Turkey Trots
Cookbook Sale	Fun-Fair with Dunk tanks and Pie in the Face events
Silent Auctions	Raffle with Themed Gift Baskets
Ice Cream Social	Garage Sale
BBQ or Cookout	Karaoke All-Star-Donate to sing/Donate to vote
Pancake Breakfast	Jersey Day
Pot-Luck Luncheon	Crazy Hat Day

Incentives

VIP parking- designate a covered or closed parking space	Gift Card to a restaurant or retail store
Auto Detailing	Tickets to a movie, sports event, theatre, or concert
IPads, TVs, Blue Ray, DVD players, or Kindles	In-Office Chair Massage
Lunch on the CEO	Free pass for a late arrival, early out, or long lunch
Weekend Get-a-Ways	Personal Day Off
Company Swag- shirts, hats, coffee mugs, etc.	

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