



EMPLOYEE CAMPAIGN MANAGER GUIDE

Thank you for being part of the **United Way of Greater Cleveland Community**.

For more than a century, United Way has served as our region's **community safety net**, bringing people, organizations, and resources together to address our most pressing challenges.

Today, the needs of our community continue to evolve.

Nearly **50% of families in Cuyahoga County** struggle to cover basic household expenses, even when someone in the household is working. Many of these families fall into what is known as the **ALICE population - Asset Limited, Income Constrained, Employed**. These are hardworking families who earn too much to qualify for public assistance but still cannot afford the basic cost of living.

United Way of Greater Cleveland works to **close this assistance gap** by investing in solutions that remove barriers to economic mobility, connect residents to resources through 2-1-1, and strengthen the support systems families rely on.

Workplace campaigns are a critical part of making this work possible.

As an **Employee Campaign Manager (ECM)**, you help mobilize colleagues to support solutions that strengthen our community and create pathways to opportunity for local families.

Whether this is your first campaign or your tenth, this guide is designed to make running a campaign **simple, organized, and successful**. Your United Way liaison is here to support you every step of the way.

Your leadership and commitment help make this work possible, and we are truly grateful for the role you play in strengthening our community. Thank you for being part of this effort.



WHY WORKPLACE CAMPAIGNS MATTER

Workplace campaigns play a vital role in advancing United Way's mission.

Historically, United Way primarily raised funds that were distributed to nonprofit agencies providing essential services. Today, United Way continues to support nonprofit partners while also **leading initiatives that address the root causes of financial instability.**

This work includes:

- Supporting families living below the **ALICE threshold**
- Expanding access to resources through **United Way 211**
- Investing in **data-driven solutions** that improve economic mobility
- Strengthening the safety net for families across Greater Cleveland

Your workplace campaign helps ensure that local families have access to the resources and opportunities they need to achieve stability and long-term success. This is where Employee Campaign Managers play a vital role.

United Way stands with more than 235,000 local ALICE households across Cuyahoga County who are working but still struggling to afford basic necessities.





YOUR ROLE AS AN EMPLOYEE CAMPAIGN MANAGER

ECMs serve as the bridge between United Way and your workplace. Your role is to help plan, promote, and execute a campaign that fits your company's culture.

As an ECM, you will:

- Serve as the liaison between United Way and your organization
- Work with United Way staff to plan and execute your campaign
- Recruit and coordinate a campaign committee
- Promote the campaign through meetings, emails, and events
- Distribute campaign materials and collect pledges
- Encourage participation, leadership giving, and volunteerism
- Share campaign results and celebrate success

Every workplace is different. The most successful campaigns are **customized to match the culture of the organization.**

Why Serve as an ECM?

Leading a workplace campaign offers meaningful professional and personal benefits:

- Leadership development experience
- Cross-departmental collaboration
- Exposure to senior leadership
- Project management skills
- Opportunities to give back to the community

How United Way Benefits Your Organization

- Higher employee engagement and morale
- Stronger collaboration across teams
- Opportunities to develop future leaders
- Positive community reputation
- Meaningful employee volunteer experiences

Important:

Employees should always feel that giving is voluntary. ECMs should never pressure colleagues to give or suggest a specific gift amount.

CAMPAIGN TIMELINE CHECKLIST

Before the Campaign:

- Attend the United Way Campaign Leadership Summit (if applicable)
- Meet with your United Way liaison to begin planning your campaign
 - **Full Campaign:** Meet with your United Way Account Manager at least **8 weeks prior to launch**. (The DonorPoint team requires approximately **6 weeks** to build a full campaign.) Please refer to the *Workplace Campaign Planning Timeline* and *DonorPoint Building Guide* for additional details.
 - **Quick Campaign:** Meet **2–3 weeks prior to launch** to allow time to plan any special events, kickoffs, or presentations. Please refer to the *Quick Campaign Timeline* for additional details.
- Review last year's campaign performance
- Set participation and fundraising goals
- Recruit your campaign committee
- Schedule a kickoff, special event or presentations (Check out our support materials for *Fundraising Event Ideas* and *Prize & Incentive Ideas*)
- Plan campaign communications and promotional activities
- Begin promoting the campaign internally to build awareness





CAMPAIGN TIMELINE CHECKLIST

During the Campaign (Typical Length 1- 4 Weeks)

- Launch with a kickoff event or announcement
- Share United Way stories and impact information
- Provide employees with access to giving platforms or pledge forms
- Host campaign events or educational sessions
- Send reminders and updates
- Track participation and celebrate progress
- Encourage employees who have not yet pledged to consider participating before the campaign closes (see “Last Ask” email template).

After the Campaign

- If using paper pledges, collect all pledge forms and contributions
- Submit campaign results to United Way and your payroll department
- Coordinate campaign envelope pick-up with your UW liaison
- If using an online campaign, United Way will close the campaign link once the ECM provides approval. UW staff will then send a final employee giving report, including payroll deductions, for you to share with your payroll department
- Announce campaign results internally
- Thank donors and volunteers for their participation and support
- Review lessons learned and document ideas for next year’s campaign

Year-Round Engagement

- Promote volunteer opportunities or host an employee service project
- Support United Emerging Leaders events to engage your young professionals
- Share United Way impact stories
- Invite employees to attend community events
- Participate in United Way 211 Day of Action
- Help keep Blessing Boxes filled at Cleveland Libraries



CAMPAIGN BEST PRACTICES

Start Early

Meet with your United Way Account Manager **eight (8) weeks out** from your campaign start. Together, you will organize forms and timelines, set goals, and plan events.

Form a Campaign Committee

Having team members involved creates buy-in. Consider a representative from each department or Employee Resource Group to engage as many people as possible.

Identify an Internal Campaign Chair

Identify one member of the C-suite to be your Campaign Chair. They should attend committee meetings and events. Your Campaign Chair should also send messages to share progress, encourage participation, and thank employees.

Set a Goal

Set and share your campaign goal with your employees! This gives the whole company something to rally around. Be sure to provide regular updates on progress.

Include Ask Amounts in Your Messages

Including a specific ask amount in your messaging results in more donations and higher gifts! If you don't want to ask for an amount, ask employees increase their gift by \$5 or \$10 per pay.

Host Special Events

Special events are a great way to encourage campaign participation! Every campaign should include at least one event. If your campaign is four (4) weeks or more, plan to host two or three!

Say Thank You

Be sure to thank everyone and celebrate milestones! Make a special effort to thank leadership donors - those who give \$1,000 or more each year. Consider hosting an appreciation event for your leadership donors, like a happy hour or luncheon to say thanks. Invite your company leaders and United Way staff to attend too!

Find Ways to Engage All Year

Your campaign is a few weeks, but United Way's work continues all year! Find ways to stay connected to the mission by organizing volunteer opportunities, supporting events, or having a year-round fundraising activity to benefit United Way.



NEED SUPPORT?

Your United Way Account Manager is your dedicated partner throughout the campaign process. From planning to final reporting, we're here every step of the way to ensure your campaign is successful, engaging, and easy to manage.

Your United Way Campaign Manager Can Help You With:

Campaign Planning

Guidance on timelines, goal setting, and strategies to run a successful and engaging campaign tailored to your organization.

Speakers and Presentations

Access to impactful speakers, including United Way leadership, staff, agency partners, and board members, who can share real stories to bring our mission to life.

Communication Templates

Ready-to-use and customizable templates, including employee ask emails, CEO/leadership messages, thank-you communications, and retiree outreach.

Campaign Materials

Branded and personalized marketing materials such as flyers, posters, and digital assets designed specifically for your organization.

Volunteer Opportunities

Opportunities for your team to get involved year-round, not just during campaign season. This helps deepen engagement and connection to the community.

Reporting and Campaign Results

Ongoing updates and final campaign reporting, with your Associate Director available to share results, provide insights, and help communicate your impact.

Your Associate Director is here to offer hands-on support whenever needed. Our partnership doesn't end when the campaign does; we're here to support your engagement with United Way all year long

Additional resources can be found here:

unitedwaycleveland.org/host-a-workplace-campaign