WORKPLACE AMBASSADOR GUIDE

PROUDLY MANAGED BY UNITED WAY FOR GREATER AUSTIN
REAGAN STONE, CAPITAL AREA CAMPAIGN MANAGER
BECAUSE OF YOU

FIRST AND FOREMOST, I WANT TO THANK YOU.

Thank you, not only on behalf of state employees, but the whole community. The work you’re doing with each campaign will truly create pathways out of poverty and support hundreds of deserving and vetted non-profit organization in Austin and beyond. Our most vulnerable neighbors, including veterans, the hungry, and homeless thank you.

As Workplace Ambassador, you are our greatest champion in creating lasting change for our community. Because of you, we are securing permanent housing for our homeless neighbors, empowering students with the quality education they deserve, and sustaining programs that are helping veterans find employment and a hot meal.

YOU ARE MAKING A DIFFERENCE.

I hope you will find this handbook helpful in guiding you, step by step, through a fruitful and fun campaign season with tools, tips, and best practices to ensure your success.

Remember, you’re not alone. Your SECC staff is here to help you. Whether it’s keeping you informed about our results, helping you get materials, or answering your questions, we are here to help you and your team.

ON BEHALF OF THE MANY PEOPLE WHOSE LIVES ARE FOREVER CHANGED BY YOUR DEDICATION, THANK YOU.

Sincerely,

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![Together We Care](secctexas.org)
YOUR ROLE AS A WORKPLACE AMBASSADOR

DONATE. VOLUNTEER. ADVOCATE.

The Workplace Ambassador is the charitable campaigns advocate in the workplace who encourages co-workers to join the movement by donating, volunteering, and advocating for charities throughout Texas. A Workplace Ambassador is the foundation of the work each charity accomplishes in our community.

Thank you for your hard work and dedication. We know that you take on these responsibilities over and above your normal position. Your support helps change thousands of Central Texans’ lives every day.

Together, we partner with hundreds of organizations and community leaders across our community to advocate, innovate, invest, volunteer and continue our shared mission in supporting charitable organization. Your individual and agency support is vital.

There are many benefits to your department and agency for loaning some of your time including strengthening external relations with other departments and state agencies. Not to mention all the benefits to you the employee who is able to create networking opportunities, increase leadership ability, and have a deeper insight into the community’s needs.
ABOUT YOUR LOCAL EMPLOYEE COMMITTEE – CAPITAL AREA SECC

OUR MISSION
We propose bold, visionary long-term funding and volunteer solutions that are possible only through collaboration across government, business, and philanthropy.

WHY WE DO THIS
No one individual, organization, or company can solve our community’s most pressing issues alone. Everyone plays a role in advancing our community. But, everyone also benefits when we succeed in moving a homeless neighbor off the street, help a student graduate high school, or match families and veterans to resources needed to thrive and help the future of your community.

When you give to the State Employee Charitable Campaign, you are part of something bigger, making a difference in both individual’s lives and investing in the future of Texas.

HISTORY
Thanks to legislation that created the SECC in 1993, employees of state agencies, community colleges, and universities throughout Texas enjoy the benefit of giving to many of their favorite charities through an annual workplace giving campaign which features the convenience of payroll deduction.

It’s not hard to see why employees of the Friendship State have responded so enthusiastically:

• It’s an easy, effective and cost-efficient way to give to charities.
• Contributions help improve the quality of life.
• The campaign supports a wide variety of vital health and human services.
• All charities in the campaign must meet strict eligibility criteria.
• The campaign is for state employees and is governed by state employees.
YOUR MAP TO SUCCESS

THE CAMPAIGN TEAM ALLOWS THE WORKPLACE AMBASSADOR TO DISTRIBUTE RESPONSIBILITY AND CREATE A PEER-DEVELOPED CAMPAIGN.

A successful campaign is all about preparation and collaboration. We understand you go above and beyond your normal job duties to advocate for charitable missions and your agency. When planning your special events, making the asks, or joining team building activities, the first place to start is to form the campaign team.

Workplace Ambassador – An Agency State Employee who works to support employee giving opportunities and builds a team to furnish their agency’s goals. The Ambassador will also make sure supervisors and managers at all levels will have all the information and tools they need to talk about the campaign during their team meetings. This equips an army of people to pitch for the campaign, rather than relying on the voice of the big gal or guy.

Key Workers – Points of contact throughout the agency or campus, co-workers, past coordinators, or new advocates who feel comfortable ‘making the ask’ to employees while looking for ways to make the campaign engaging, meaningful, and fun. Look for an individual who is widely respected among her or his fellow employees, someone with energy, a positive spirit, creativity, and passion for the organization and the project. Select a peer, not a member of senior management, so that you can avoid the conflict of supervisors “soliciting” their subordinates.

Dean of Giving – A Department Director or Division Manager who will speak for the team to Agency Directors or Commissioners. This person must be willing to furnish Board and C-Suite engagement. Make the campaign a “big deal” around the office and you can get excitement and momentum for your efforts. Throw a kick-off party to get everything started, then communicate frequently with staff members using payroll stuffers, mailbox stuffers, posters, email blasts, and give-aways.

Payroll/ HR – One or more HR representatives who will act as recipients of all completed pledge materials. A main point of contact for developing online giving programs.

Marketing – A communications officer who has approval and access to market the campaign through agency wide emails, the internal web, and other agency social media tools.
TO HELP YOU OUT, WE’VE CREATED THIS TIMELINE

PRE-CAMPAIGN (4-6 WEEKS BEFORE CAMPAIGN)

**Affirm Top Management Support**
- Gain approval for recruiting a campaign team and holding meetings and activities on agency time.
- Ask for visible support from company leadership during the campaign.
- Discuss strategies for top-down support, i.e. agency gift, special event, or match.
- Discuss options for engaging senior staff through a focused leadership campaign.
- Discuss options for incentives that can be used to encourage participation and increased giving.

**Build a Strong Campaign Team**
- Recruit a diverse team that includes people from different departments and levels (i.e., management, administrative, labor, etc.) within the workplace.
- Invite both new and previously involved committee members to participate.
- Set a schedule of committee meetings and distribute to members.

**Develop a Campaign Plan**
- Invite your SECC representative to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within your agency culture.
- Determine the means of pledging best suited to your agency: pre-printed pledge forms, PDF pledge forms, or if your agency has online pledging capability. Work with your SECC representative to arrange for delivery or pickup of all your campaign materials.
- Determine the campaign timeline including the pledging timeframe and any presentations and activities that will be taking place.
- Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, special events, securing incentives, etc.
- Evaluate past results and identify areas where potential for increases may exist – dollars raised, participation, volunteerism, etc. and set a campaign goal that focuses on these areas.

**Promote the Campaign**
- Place information (posters, flyers, thermometers, etc.) in high traffic areas around your office such as entry ways and break rooms in the weeks leading up to the kickoff
- Use multiple methods of communication to inform people about the campaign: post information on your intranet, announce the campaign at staff meetings, social media, etc.
DURING CAMPAIGN (RECOMMENDED 2-6 WEEKS)

Hold the Campaign Kickoff
- Start the campaign with your company’s leadership and campaign team.
- Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, timeframe, activities and incentives.
- Invite a member of the leadership team to the general kickoff meeting(s) to communicate management endorsement of the campaign.
- Invite local charity representatives to speak at the meeting(s).

Make the Ask
- The number one reason people say they didn’t give is because they weren’t asked!
Make sure that everyone is given the opportunity to make a contribution to the campaign.
Use the campaign kickoff, department meetings, and one-on-one conversations to encourage participation.
- Personally distribute and collect pledge forms. Ask everyone to return their pledge form, even if they choose not to give.
- Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference!
- Inform employees about volunteer opportunities such as United Way’s Fall/Spring Day of Caring.

Monitor and Report Progress
- Send out reminders to encourage people to turn in their pledges.
- Keep a running total of dollars raised as pledges are collected.
- Provide regular updates to employees – send out email blasts, update thermometers, etc.
- Make personal follow-ups with individuals who have not turned in their pledge as the campaign nears the end.

Wrap-Up the Campaign
- Ensure all pledges are turned in. Keep check or cash payments for those who opted to make a one-time gift stapled to copy of pledge form.
- Schedule a meeting with your SECC representative to finalize the campaign – pick up the envelope, extra campaign supplies, etc.
- Report your final campaign results to employees and leadership.
POST-CAMPAIGN (1-2 WEEKS)

Say “Thank You”

- Recognize and thank donors! Show them the impact of their contribution on the community and encourage them to stay engaged to the work they helped fund.
- Plan a “Thank You” event and invite everyone to attend. Invite a charity representative to deliver a “Thank You” presentation.
- Send thank you emails, ask the CEO for a thank-you message to communicate to employees, hang “Thank You” posters, give out “Thank You” pins, buttons, and cards.
- Don’t forget to thank your campaign team for all their help!

YEAR-ROUND ENGAGEMENT (ALL YEAR LONG!)

Encourage and Offer Year-Round Involvement

- Build momentum for the next campaign.
- Distribute year-round success stories. Quarterly newsletters available through the Campaign Manager.
- Post results and celebrations on social media.
- Plan with HR to solicit new hires year-round and provide internal and external campaign staff with information to those employees transitioning or retiring.
- Take your staff on tours of local charitable organizations.
- Volunteer! Work with your SECC representative to organize volunteer projects with our member organizations or go online at www.handsoncentraltexas.org to take action.
FIVE STEPS FOR A SUCCESSFUL ASK

1. Get the donors undivided attention

   • Start the discussion on a positive, friendly note.
   • Explain the purpose of your visit.
   • Find out what they know about charities in community.

2. Explain the purpose of the SECC and why you support it

   • Bring materials and pledge forms and be prepared to explain them. Provide a brochure or cut-out to important links to each person.
   • Share a personal story, success story, or community statistic.

3. Ask for the pledge

   • With new givers, ask for a first-time gift.
   • For annual givers, encourage an increase.
   • Consider asking for a specific increase, such as $1 more a week or $10 more per pay period.
   • Remember, you are not asking for yourself; you are asking on behalf of someone who needs help.
   • Offer incentives for attending pledging parties.

4. Answer questions and handle concerns

   • Know your materials and answer questions honestly – never guess. If you don’t know the answer to a question, let the donor know you will find out and then follow up with your representative.
   • Recognize that some donors have real concerns; people have a right to feel good about their gift.

5. Say thank you

   • Regardless of what the donor decides, thank them for their time.
   • People like to know their gift is appreciated.
FUN EVENTS CREATE CAMPAIGN AWARENESS

Themes
Themes help create excitement and energy for the campaign and are used to help drive results. Examples include:

<table>
<thead>
<tr>
<th>Theme</th>
<th>Example</th>
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<tbody>
<tr>
<td>Super Heroes</td>
<td>Hollywood – Movies, Oscars, Walk of Fame</td>
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<tr>
<td>Reality TV – Amazing Race</td>
<td>Power of Giving</td>
</tr>
<tr>
<td>Carnival Theme with Dunk Tanks</td>
<td>Sports/ Olympics</td>
</tr>
<tr>
<td>Driving Results – Car/Race</td>
<td>Travel/ Around the World</td>
</tr>
<tr>
<td>Beach</td>
<td>Wild, Wild West</td>
</tr>
<tr>
<td>Game Show</td>
<td>60’s, 70’s, 80’s Themes</td>
</tr>
<tr>
<td>Hawaiian – Luau</td>
<td>University Alumni – Employee’s alma maters</td>
</tr>
</tbody>
</table>

“FunRaisers”
“FunRaisers” can be used to raise awareness of the campaign and can be held as kickoff or wrap-up events. If your “FunRaiser” is intended to solicit contributions make sure to hold the event after your payroll pledge drive.

<table>
<thead>
<tr>
<th>Event</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeans Day – “sell” jeans day</td>
<td>Book/ Garage Sale – Sell donated books/ items</td>
</tr>
<tr>
<td>coupons for a certain dollar</td>
<td></td>
</tr>
<tr>
<td>amount</td>
<td></td>
</tr>
<tr>
<td>Bake Sales/ Basket Sales/ Craft</td>
<td>Car Wash – Senior Management washes cars</td>
</tr>
<tr>
<td>Sales</td>
<td></td>
</tr>
<tr>
<td>$1 interagency thank you or</td>
<td>Golf Tournament</td>
</tr>
<tr>
<td>appreciation notes</td>
<td></td>
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<tr>
<td>Ice Cream Social</td>
<td>Bake Sales, Basket Sales, Craft Sales</td>
</tr>
<tr>
<td>Cube Decorating Contests</td>
<td>Managers serve Breakfast or Lunch</td>
</tr>
<tr>
<td>Silent Auction – use email to</td>
<td>Yall know about BBQ!</td>
</tr>
<tr>
<td>auction off donated items</td>
<td></td>
</tr>
</tbody>
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Incentives
Many organizations provide incentives tied to their campaign goals. A large budget is not necessary for incentives – there are many free incentives you can offer to employees for signing a payroll promise. These items can also be donated and used in silent auctions.

<table>
<thead>
<tr>
<th>Incentive</th>
<th>Example</th>
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<tbody>
<tr>
<td>Personal Day Off</td>
<td>Lunch with a Manager, Director, or Commissioner</td>
</tr>
<tr>
<td>Long Lunch Passes</td>
<td>Gift Cards – Retail, Gas, Oil Change, ect.</td>
</tr>
<tr>
<td>Jeans/ Casual Day Passes</td>
<td></td>
</tr>
<tr>
<td>“VIP” Parking Spot</td>
<td></td>
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<tr>
<td>Sports/ Show/ Movie Tickets</td>
<td></td>
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<tr>
<td>Agency Gear</td>
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Frequently Asked Questions

Q: What is the SECC or an employee giving campaign?
A: The State Employee Charitable Campaign is an employee giving campaign that allows every state agency employee, elected official, or higher education employee to help support our community-based and state-wide charitable missions through personal financial contributions.

Q: I already give so much, why should I contribute financially?
A: While the dedication you make to our community is beyond measure, making a voluntary philanthropic gift is another way to strengthen our community. You may also choose to donate your time. Check out community-based volunteer projects.

Q: Many organizations ask for my support, why should I donate through the SECC?
A: Giving back to local organizations together sends a powerful statement to your colleagues and our state-wide community. Charitable organizations rely on the generosity of our community so that we may continue to provide outstanding care, services, and opportunities to the most vulnerable. Each year, contributions from thousands of individuals support everything from child life programs to innovations in community programs, research and grants that aren’t part of charitable organization’s operating budget, and provide us with the funding needed to be the best at what we do. Join the community and your fellow colleagues in supporting your favorite non-profit mission today!

Q: Is participation in the employee giving campaign mandatory?
A: No. Financial contributions are completely voluntary.

Q: How do I make a donation?
A: The greatest impact and easiest way to give is through Payroll Deduction. You can designate to charities of your choice through the SECC and have your gift deducted from your paycheck. The donation spreads your giving over a year and allows charities quarterly payments to boast community-based program budgets and increase charitable services. Sign a payroll deduction form today and relay your donation to your agencies Coordinator or Ambassador. Also ask if online giving is at your agency!

You may also choose to participate through one-time gifts by check or cash or the gift of your time by volunteering. In any way you give, Thank you!