# YOU MAKE THE BIGGEST IMPACT

IU Team Captains and Unit Leaders are crucially important connections between the people who need help in our community and those who want to help. Your role as a campaign leader is one of the most important jobs there is in supporting the community! This guide includes tips, how-to’s and ideas to make your campaign a success.

Remember that the United Way staff is also here to help you. Each department on campus is different and unique, and what works for one may not work for all. Want to bounce ideas off someone, or have questions? Please reach out to us. We are here to help make your efforts a success!

## IU CAMPAIGN LEADERSHIP

### Campaign Chairs

Paul Helmke

CampaignCo-Chair

*Professor of Practice, O’Neill School of Public and Environmental Affairs*

*Director, Civic Leaders Center*

[phelmke@indiana.edu](mailto:phelmke@indiana.edu)

Ash Soni

Campaign Co-Chair

*Interim Dean, Kelley School of Business*

*Professor of Operations & Decision Technologies, Kelley School of Business*

[*soni@indiana.edu*](mailto:soni@indiana.edu)

### IU United Way Campaign Manager

Kirk White

*Assistant Vice President of Strategic Partnerships, Government Relations and Economic Engagement*

*Vice Provost for External Relations*

[krwhite@iu.edu](mailto:krwhite@iu.edu)

### IU United Way Deputy Campaign Manager

Jennifer Piurek

*Director, Communications and Special Projects, Office of the Provost*

[jpiurek@iu.edu](mailto:jpiurek@iu.edu)

### IU United Way Campaign Coordinator

Catherine Blankensop

[catblank@iu.edu](mailto:catblank@iu.edu)

### Vanguard Leadership Giving Society Chair

Jim Grandorf, Chair

*Emeritus Professor of Accounting*

### United Way of Monroe County

431 S College Ave

Bloomington IN 47403

Phone: 812-334-8370 www.monroeunitedway.org

Sherrie Shuler  
*Resource Development Director* [sherrie@monroeunitedway.org](mailto:sherrie@monroeunitedway.org)

## KEY DATES

**IU Campaign Kick-Off**

Sept. 19, 2022, 11:30 am – 1 pm

Indiana Memorial Union, Frangipani Room

**IU Campaign Payroll Deduction Deadline**Dec. 14, 2022

## TABLE OF CONTENTS

**What is United Way? …………………….. 3**

**IU Quick Campaign Checklist ………….. 4**

**How to Run a Campaign ………………... 5**

September 2022

Dear Campus United Way Leaders:

It’s time to kick off the [2022 Indiana University United Way campaign](https://unitedway.indiana.edu/)!

This year’s effort is focused on the theme **Rebuilding Community, Rebuilding Hope** because United Way of Monroe County is helping our community continue to rebuild in response to the COVID-19 pandemic. The United Way team is working toward a more equitable and accessible education, financial stability, and health for everyone. IU donors are vitally important to the community effort; last year we raised 64% of the total community campaign and contributed thousands of volunteer hours to agencies.

The needs of our community served by United Way and its 24 partner agencies are diverse and many have amplified during the pandemic. I know that together, and with your volunteer leadership, we can make a real difference*.*

This manual is your guide to the campaign. It contains information about how employees can make donations, how to use the online database to track team and departmental progress, and tips on how to run a successful campaign.

This year, we are encouraging all who are able to give to donate online through e-Pledge on the campus United Way website, which will simplify the process of managing your group. Be sure to use the tools and information accessible to team captains and unit leaders on the [“Campaign Leader Resources” intranet](https://unitedway.indiana.edu/intranet/index.html) at the bottom of the IU-United Way Website. This section of the site includes a campaign calendar and a campaign toolkit, where you can find images, example emails, and thank you cards to help acknowledge your donors and volunteers. Bookmark and visit the site often throughout the campaign.

If you have questions, please contact Sherrie Shuler, Resource Development Director, at [sherrie@monroeunitedway.org](mailto:sherrie@monroeunitedway.org) or (812) 334-8370 ext. 13. Sherrie is ready to talk through ideas on fundraising and how to increase your department’s involvement or to help schedule a speaker to virtually visit with your office.

Thank you for your dedication to the campaign. Contributions by the IU family comprise a major portion of the resources for many local organizations. Our efforts and donations have great power in our community.



Kirk White, IU United Way Campaign Manager

Vice Provost for External Relations, IU Bloomington

Assistant Vice President, Government Relations and Economic Engagement

2

**WHAT IS UNITED WAY?**

United Way of Monroe County works with 23 certified member agencies and other partners to improve people’s lives and build a stronger community. By supporting agencies and initiatives that provide services in health, education, and financial stability, United Way ensures that people in crisis can get the help they need right away and address the underlying issues they face. At the same time, United Way helps people in Monroe, Owen, and Greene counties get the education and earning opportunities that will keep them from needing safety-net services in the future.

IU staff, faculty, and students raise more than half of all donations to United Way of Monroe County and its partner agencies and programs. Thank you for your continued leadership and generosity. **An investment in United Way is the single best way to help the most people in need in our community. To see your donation in action, visit www.monroeunitedway.org/myimpact.**

### Investing in Member Agencies

* American Red Cross of Southeast Indiana
* Amethyst House
* Area 10 Agency on Aging
* Beacon, Inc.
* Big Brothers Big Sisters of South Central Indiana
* Boy Scouts – Hoosier Trails Council
* Boys & Girls Clubs of Bloomington
* Cancer Support Community South Central Indiana
* Catholic Charities Bloomington
* Community Kitchen of Monroe County
* Girl Scouts of Central Indiana
* HealthNet Bloomington Health Center
* Hoosier Hills Food Bank
* Indiana Legal Services
* Monroe County Community School Corporation
* Middle Way House
* Monroe County United Ministries
* Mother Hubbard’s Cupboard
* New Hope for Families
* Planned Parenthood Great Northwest, Hawai’i, Alaska, Indiana, Kentucky
* Richland-Bean Blossom Community School Corporation
* Salvation Army
* Stone Belt

### Leading Initiatives

* AFL-CIO Community Services
* Bank On Bloomington
* Born Learning
* COVID-19 Emergency Relief Fund
* Dollars and Sense Personal Finance Classes
* Education Mini-Grants
* Emergency Food and Shelter Program
* Financial Coaching
* Free Community Tax Service
* Heading Home South Central Indiana
* Roadmap to Success
* United Against Hunger

### Supporting Community Partnerships

* 2-1-1
* Community Organizations Active in Disaster (MoCOAD)
* Let’s Read
* Nonprofit Alliance of Monroe County
* Nurse Family Partnership
* SingleCare Discount Prescription Program
* Stamp Out Hunger

3

## IU CAMPAIGN QUICK CHECKLIST

The IU Campaign for United Way is an opportunity for faculty and staff to participate in making the community a better place for all its citizens. Below are the basics of running a United Way campus campaign and getting your colleagues involved:

|  |  |
| --- | --- |
|  | Attend the IU-United Way Campaign Kick-Off Sept. 19 at the Indiana Memorial Union, Frangipani Room. |
|  | Define roles and responsibilities within your area: Name key volunteers and plan special events related to topics that are especially meaningful for your group (ex: food insecurity, literacy, COVID-relief for families). |
|  | Log on to e-Pledge to find your 2022 – 2023 goal. With last year’s transition to e-Pledge, volunteers can contact the Campaign Coordinator, Catherine Blankensop ([catblank@iu.edu](mailto:catblank@iu.edu)) for information regarding historic donations for your department. |
|  | Create a campaign calendar for your team or unit based on specific plans, and make yourself an internal calendar that includes dates to send fun, informative campaign updates. |
|  | Decide how best to promote and communicate the campaign through marketing, incentives, and fun online activities. Share your campaign through photos and video on your website and social media, and follow and tag United Way of Monroe County on [Facebook](https://www.facebook.com/MonroeUnitedWay/?pageid=180035863310&ftentidentifier=10158099690533311&padding=0), [Twitter](https://twitter.com/monroeunitedway?lang=en) and [Instagram](https://www.instagram.com/monroeunitedway/). |
|  | Start your campaign! |
|  | **THANK DONORS!** Saying thanks is a big deal, because each donation is a big deal. Use the thank you email template in the campaign toolkit or come up with your own way of saying thank you. |
|  | Keep track of donations through E-Pledge and report end results at the conclusion of the campaign. Everyone will want to know the impact of their gifts on the lives of those in need. |
|  | Start planning for next year! Know that your efforts and those of your co-workers will have lifelong effects on others’ lives. Your help is deeply appreciated by many, so take a moment to feel good about the time and work you expended to make this a successful campaign! |
|  |  |
|  |  |

## HOW TO RUN A WORKPLACE CAMPAIGN

Remember, United Way staff are here to help you in any way possible. For campaign-related questions, call or email Sherrie Shuler at 812-334-8370 ext. 13 or [sherrie@monroeunitedway.org](mailto:sherrie@monroeunitedway.org). For technical questions regarding E-Pledge, email David Cook at [david@monroeunitedway.org](mailto:david@monroeunitedway.org).

### #1: e-Pledge & Team/Unit Goals

1. **Log On**

Visit e-Pledge portal at [unitedway.indiana.edu](https://www.indiana.edu/~uwayiub2/donations/manage/index.php). Scroll to the “Campaign Leader Resources” Intranet link at the very bottom of the page and follow the CAS login prompts to the red “Access e-Pledge” button.

1. **Find Your Goal**

Once logged in, visit the IU Custom Rpts tab, and run an IU Team & Dept Report. Select your team to find your overall goal or view the goals of individual units. Check back here throughout the campaign to determine your progress to your goal. Questions regarding team or unit composition may be directed to Catherine Blankensop, IU’s United Way Campaign Coordinator, [catblank@iu.edu](mailto:catblank@iu.edu).

1. **Find Your Donors**

Volunteers are able to access only one year of historical donations data since the transition to

e-Pledge in 2021. Those who would older historical data can reach out to Catherine Blankensop at [catblank@iu.edu](mailto:catblank@iu.edu).

### #2: Determine your campaign dates & enlist the help of a few coworkers

Having a beginning, middle, and end of a campaign are a must along with deciding WHO in your department will be part of planning and executing your campaign plans. Deadlines help define and drive the momentum of your campaign; and the length of your campaign can range from a few days, to a week or a whole month. Discussing what makes sense in your department should be one of the first things you do as a team. These dates will determine when and how you kick off your area’s campaign, send reminder messages, how to create excitement and team bonding during a year of mostly online work, and establish a deadline for pledge forms to be turned in.

**Our campaign will run: \_\_\_\_/\_\_\_\_/\_\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_\_.**

(All IU Campaigns must be turned in for Payroll Deduction by December 14.)

### #3: Plan Campaign Timeline & Activities

Once you know your goal and have picked your team members and familiarized yourself with

E-Pledge, it’s time to decide how you to make your campaign fun and engaging. The scope and activity level surrounding your campaign is determined by the desired outcome, what you can take on as the team captain or unit leader, and what your team is motivated to help you accomplish! Keep in mind the personality of your department. What works for one department might not work for yours. What do your co-workers like to do for fun, and how do you typically bond as a group? How do they prefer to receive information?

#### Elements of a United Way Workplace Campaign

* **Kick-off**

Many offices hold an individual kickoff event or activity. Many events can be held successfully online, so consider hosting a virtual meeting and ask a United Way representative to speak briefly about United Way’s work. Or share the campaign video during a staff meeting and talk about why you donate to United Way. Some departments have had success building a kickoff into an existing regular meeting where many staff members are present. There are many creative ways you can use to launch your campaign. The key is to let co-workers know how much their gifts to United Way impact the community and how they can participate.

* **Special Events**

These activities are often great for raising some additional funds, doing something fun, and helping raise awareness about the campaign.

***Examples***

*Have a virtual scavenger hunt, cutest pet contest, or talent show. Anyone who has made a donation may enter, and the winner gets a prize.*

**For more special event ideas, check out the Fun-Raising list in the Campaign Toolkit.**

* **Incentives**

Incentives can be a great way to get people involved in a campaign. These can be incentives to attend meetings, volunteer time, or to give. They can be raffles, giveaways, early bird contributions, or competitions between departments, just to name a few!

Incentives should be affordable and can be a simple token, or a donated item. You can also choose things that are easy to mail, like gift cards.

**#4: Messaging & Campaign Communications**

This is where your area’s marketing or communications professional can help. Decide how you’ll announce important information about the campaign at your workplace and explain how employees can participate.

**Ensure that the information people need to know reaches them, including:**

1. Beginning and end of campaign dates
2. Dates of any special events or kick-off event/activity
3. Deadline to make their donations
4. Who is the person in their department to ask if they have questions
5. e-Pledge donation portal link
6. How to donate by paper pledge form
7. Why giving to United Way is a good thing and how donating helps our community! (See the accompanying Resource Guide for more information on the work of United Way in Monroe, Owen, and Greene counties or check out the website at www.monroeunitedway.org).

**Campaign Messages:**

The most basic campaign messages should be:

1. A kickoff email sent at the beginning of the campaign
2. A follow-up midway through with an update and reminder
3. An end-of-campaign message right before the close of your campaign

Do you have a larger campaign and want to get fancy? Make a list of past donors and send one message to them thanking and acknowledging past support. Then send a different email to new/prospective donors asking for their participation in the campaign. Recognizing past support can help renew gifts that were made by employees during the prior year’s campaign.

**For sample email templates, check out the Resource Guide.**

**Be the expert!**

You will probably receive some questions from coworkers. Be prepared with an answer by visiting the ‘What is United Way’ section (on page 4) and our FAQ’s in the accompanying **Resource Guide** to familiarize yourself with United Way. **To read more about United Way of Monroe County,** you can also visit our website: [www.monroeunitedway.org](http://www.monroeunitedway.org/)

**Got a question you can’t answer?** Just call or email Sherrie Shuler at [sherrie@monroeunitedway.org](mailto:sherrie@monroeunitedway.org) or 812-334-8370 ext. 13.

**Thank Donors:**

Generous donors are far more likely to give again next year if they are thanked right away! United Way will acknowledge gifts once they are received, but because of processing times and differing campaign schedules, that information can take a while to reach us. **You can send a thank you note by email using graphics in the campaign toolkit. If people from your department are working on campus, you can print out and send them a thank you through campus mail.**

**RESOURCE: Download printable thank you cards and find graphics to put in emails in** the online toolkit: [www.monroeunitedway.org/IUToolkit](http://www.monroeunitedway.org/IUToolkit).

**#5 Paper Pledge Forms**

Paper pledge forms are available upon request. Email Catherine Blankensop at [catblank@iu.edu](mailto:catblank@iu.edu). They will be sent in campus mail and must be returned by mail to the United Way office. The forms should be delivered or mailed to the United Way office in person at 431 S College Ave, Bloomington IN 47401.

**#6: Share your Campaign & Be Recognized!**

**Celebrate your co-workers’ generosity and caring! We want to hear about – and see – your campaign!** Remember to snap pictures of any great moments of your virtual or physically distanced events and email them to **Jenn Hottell at: jenn@monroeunitedway.org.**



Be sure to follow us on Facebook, Instagram, and Twitter! Share your United Way

moments on your feed and ours at: [**www.facebook.com/MonroeUnitedWay**](http://www.facebook.com/MonroeUnitedWay) **www.instagram.com/MonroeUnitedWay twitter.com/MonroeUnitedWay**

**Thank you**