

United Way Workplace Fund Drive Handbook

Thank you for supporting United Way of South Central Indiana by volunteering to be an Employee Campaign Coordinator (ECC). You play a very important role in connecting people in our community to ways that they can support their neighbors. You are the lead volunteer and contact person for your workplace's United Way fund drive. We couldn't do what we do without you!

In this guide, you'll find everything you need to make your workplace fund drive a success.

Key Contacts at United Way

United Way staff are here to help however we can! Always reach out with any questions or requests.

Randy Rogers

President & CEO

randy@unitedwaysci.org

David Cook

Development Operations Manager

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Chris Hazel

Finance Director

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Key Dates

United Way Blue Jean Ball

Thursday, September 18, 5 – 7:30pm

Whippoorwill Hill (1780 E Rayletown Rd)

End of Community Campaign

November 14, 2025

<https://441monroecounty.sharepoint.com/sites/Campaign2020-20/Shared Documents/Fund Drive 2025/Workplaces/Materials for Everyone/2025 United Way Workplace Fund Drive Handbook.docx>

How does a United Way Fund Drive work?

Every United Way fund drive is different. Ultimately, you are encouraging your colleagues to give to United Way through payroll deduction, credit card, or cash/check. Factors like workplace structure, number of employees, workplace locations, and more will affect your fund drive's details. Some workplaces organize events, games, and prizes. Other organizations promote the fund drive via email. However you choose to do your fund drive, we are grateful to be a part of your workplace!

Here are some things that you need to consider before your fund drive kicks off:

1. Who will lead your fund drive?

This will depend heavily on your workplace structure and leadership preferences. You may appoint one volunteer (likely you, the one reading this) to be the main point of contact for the fund drive. Larger fund drives may create a committee or cabinet. Think about who in your workplace will be involved in leading and making decisions.

2. Who else needs to be a part of the fund drive?

You may need or want to collaborate with others for your fund drive. For example, your HR and/or payroll department(s) will need to be involved in managing payroll deduction donations. You may want to recruit your marketing department to help promote the fund drive. These can be vital roles in the success of your drive.

3. How will you run your fund drive?

Think about how donations and pledges will be collected and processed. Some workplaces have their own internal systems for this. United Way can also provide printed donation forms or an online donation portal. If it is fitting for your workplace, we recommend opting for paper donation forms over an online donation portal. While an online portal is easy, paper forms are proven to increase response rates. A hybrid option is also possible.

4. When will you run your fund drive?

United Way kicks off our community fund drive at the Blue Jean Ball on September 18, 2025, and wraps up on November 14, 2025. We ask that you please keep your fund drive within these dates, though some exceptions can be made. We also highly recommend that you keep your fund drive length between one and four weeks.

5. What is our fund drive goal?

Setting goals will help your fund drive work toward a shared sense of accomplishment. You can set your own goal, or United Way staff can help you determine a goal to set.

Here are some things that you can incorporate into your fund drive:

1. Fund drive presentations or activities

It is helpful to talk about the United Way fund drive in person, or even virtually. We highly recommend you identify a time to present the fund drive to your team. This could be a brief presentation during a staff meeting, a special kick-off event, a learning lunch, or even a volunteer activity. Please reach out to United Way staff to identify at least one speaking opportunity if at all possible.

2. Fund drive emails

Of course, announcing the fund drive via email is also an important step, especially in workplaces where email is a primary form of communication. Please plan to send at least one email at the beginning of your fund drive and one email at the end. You can use the email templates provided in this handbook.

3. Fund drive incentives

You can gain more engagement from employees by offering incentives. The most common incentive we see is a free PTO day for employees who give at a certain level. Other incentives could include entries into a drawing for gift cards or prizes, swag items, or an event to celebrate meeting a fund drive goal. Please reach out to United Way staff to brainstorm any ideas you may have. We're happy to help!

4. Fund drive corporate matches

If matching employee donations with a corporate gift is possible, this is a great way to encourage participation by employees. Telling folks that each dollar they gift is doubled by their employer is a great incentive to give. Even partial matches have a positive effect in increasing participation. United Way staff are happy to meet to discuss this further or answer any questions you may have.

Here are the things you need to address once your campaign has been wrapped up:

1. Donation and pledge collection

<https://441monroecounty.sharepoint.com/sites/Campaign2020-20/Shared Documents/Fund Drive 2025/Workplaces/Materials for Everyone/2025 United Way Workplace Fund Drive Handbook.docx>

If you used paper donation forms, make sure they are all collected and original forms are returned to United Way. Be sure to keep copies for your organization's records. All donations should be kept confidential and protected.

If you used United Way's online donation portal, notify United Way staff when your fund drive is officially over. You will then receive fund drive reports for your organization's records. **Contact** david@unitedwaysci.org.

If you used any other internal process for your fund drive, please send reports to United Way staff. It is most important for us to know the total amount of one-time donations and the total amount of payroll deduction pledges. It is also helpful for us to know the process for receiving these donations. Additionally, information about individual donations is greatly appreciated.

2. Payroll deductions

Be sure that all fund drive information is received by your HR and/or payroll department(s) to properly process all payroll deduction donations from employees' paychecks. Note: Some payroll processors require employee signature on pledge form in order to process payroll deductions.

3. Announce your fund drive results and celebrate!

Be sure to announce the fund drive results to your team and celebrate the incredible impact you've made in your community! You can do this via email or a meeting. If your fund drive did include incentives, be sure that they are all promptly distributed to those who earned them.

We encourage you to share your fund drive on social media, and be sure to tag United Way! You can also send any photos you took of your campaign to us to share on our social media pages. We're also happy to come to take a group photo to feature your team!

Either email photos to us or email our staff to arrange for a photo shoot: **Contact: Jenn at** jenn@unitedwaysci.org.

Facebook: United Way of South Central Indiana, @UnitedWaySCI

Instagram: @unitedway_sci

LinkedIn: United Way of South Central Indiana, @unitedwaysci

United Way Information and Resources

- [United Way Mission and Values](#)
- [United Way who we serve](#)

- [Youth Opportunity](#)
- [Healthy Community](#)
- [Financial Security](#)
- [Community Resiliency](#)
- [United Way impact report](#)
- [United Way Fund Drive Toolkit](#)
- [United Way FAQ](#)

Sample Emails

INSTRUCTIONS: These emails must be personalized by you for your workplace. The missing information that must be inputted is highlighted in yellow.

Also, if these emails are coming from a workplace leader, it is always helpful for them to add a personal note about why support United Way is important to them.

Sample 1: Kick-off Email

Subject: Connecting People to Possibility

The United Way 2025 fund drive is officially underway! We invite you to help create lasting change in our community. (Insert instructions on how to give)

A gift to [United Way of South Central Indiana](#) **connects people to possibility**—opening doors to youth opportunity, financial security, healthy communities, and lasting community resiliency.

Your support funds local programs that help families make ends meet today and build stronger, more stable futures. From access to healthy food and mental health support to tax assistance and youth mentoring, every donation powers solutions that improve lives right here at home. Together in 2024, we invested over **\$1.7 million** to support our region.

Nearly half of the families in our region are just one emergency away from poverty, and **together**, we're tackling challenges no one can solve alone.

Thank you!

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Sample 2: Reminder Email

Subject: You can connect people to possibility

Did you know that 1 in every 3 people in south central Indiana are touched by United Way funded programs? When you give to United Way, you're supporting your neighbors, your colleagues, and your community.

A gift to [United Way of South Central Indiana](#) **connects people to possibility**. Please consider giving to the United Way 2025 fund drive today. (insert instructions on how to give)

Your support funds local programs that help families make ends meet today and build stronger, more stable futures. **Together**, we're tackling challenges no one can solve alone.

Thank you!

Sample 3: Deadline Reminder

Subject: Don't miss the opportunity to give!

This is a reminder that the United Way 2025 fund drive wraps up on (date). Please be sure to make your donation before the deadline. (insert instructions on how to give)

A gift to [United Way of South Central Indiana](#) **connects people to possibility**—opening doors to youth opportunity, financial security, healthy communities, and lasting community resiliency.

Your support funds local programs that help families make ends meet today and build stronger, more stable futures. From access to healthy food and mental health support to tax assistance and youth mentoring, every donation powers solutions that improve lives right here at home. Together in 2024, we invested over **\$1.7 million** to support our region.

Please join me and other coworkers in supporting United Way and their vital work in south central Indiana.

Thank you!

Sample 4: Thank You Email

Subject: Thank you!

Thank you for your generous donation to this year's United Way campaign. Thanks to donors like you, we raised \$(amount), which was (percentage)% of our goal. I'm proud of

how we rallied together to make an impact for the future of our community. It takes everyone, and you showed up!

Together, we are changing the stories of thousands of people, which is no small task. It takes a little bit from all of us to make those positive changes for so many. Feel great, pat yourself on the back and know that every day this year, your donation is helping connect people to possibility.

Thank you!