



# UNITED WAY PLAYBOOK

CAMPAIGN CHAMPION TRAINING MANUAL

LIVE UNITED



United Way of the Big Bend

# PLAYBOOK

CHANGE  
WON'T HAPPEN  
WITHOUT YOU



## DEAR CHANGEMAKER,

Thank you for being an agent of change in our community through United Way's workplace campaign. You are making a difference in the lives of thousands in the Big Bend region.

If you are a longtime supporter of the United Way, thank you for your ongoing commitment. If you are new to United Way, thank you for joining the fight for a better, stronger Big Bend.

In this United Way Playbook, you'll learn about the best practices of coordinating a United Way workplace giving campaign and ways you can roll up your sleeve and make a difference. We hope you find the information helpful.

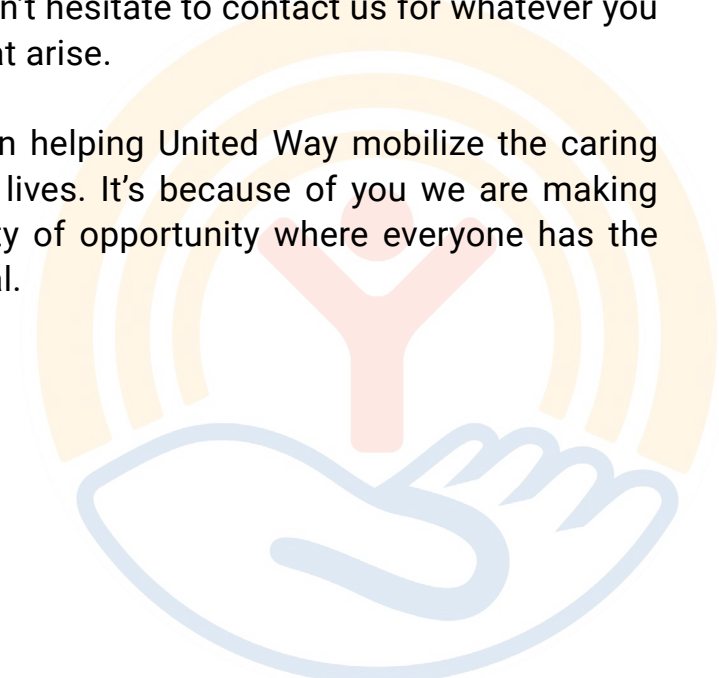
As a philanthropic leader in our community, your energy and commitment will have a direct impact on those living in the ALICE population and below.

Keep in mind United Way staff members and Loaned Executives stand ready to support you in every possible way. Don't hesitate to contact us for whatever you need and to answer any questions that arise.

Thank you again for being a leader in helping United Way mobilize the caring power of our community to improve lives. It's because of you we are making great strides in creating a community of opportunity where everyone has the opportunity to reach their full potential.

Sincerely,

United Way of the Big Bend Staff and  
Board of Directors



GIVE. ADVOCATE. VOLUNTEER.

# SEVENTEEN

WHO IS ALICE.....	3
OUR STRATEGIC DIRECTION.....	5
ECC ROLES & RESPONSIBILITIES .....	6
8 STEPS TO A GREAT CAMPAIGN .....	7
<b>STEP 1: YOUR TEAM</b> .....	8
Recruit & Train Your Campaign Team.....	8
<b>STEP 2: MAKE YOUR PLAN</b> .....	9
<b>STEP 3: YOUR CAMPAIGN</b> .....	10
Awards .....	10
Pacesetter Campaign .....	10
<i>Fundraising Guide</i> .....	11
Leadership Giving Societies .....	11
Conducting A Leadership Campaign.....	12
Leadership Giving Presentation: Sample Agenda .....	13
<b>STEP 4: PROMOTE &amp; EDUCATE</b> .....	14
Promote.....	14
Educate.....	14
Let's Get Social.....	15
Community Impact Initiatives.....	15
New Hires .....	16
Retirees .....	17
Engagement.....	18
<b>STEP 5: CAMPAIGN KICK OFF</b> .....	19
Timeline.....	21
<b>CAMPAIGN BEST PRACTICES</b> .....	22
<b>STEP 6: REPORT THE RESULTS</b> .....	24
<b>STEP 7: SAY “THANK YOU”</b> .....	25
<b>STEP 8: EVALUATE YOUR CAMPAIGN</b> .....	26
<b>FREQUENTLY ASKED QUESTIONS</b> .....	27



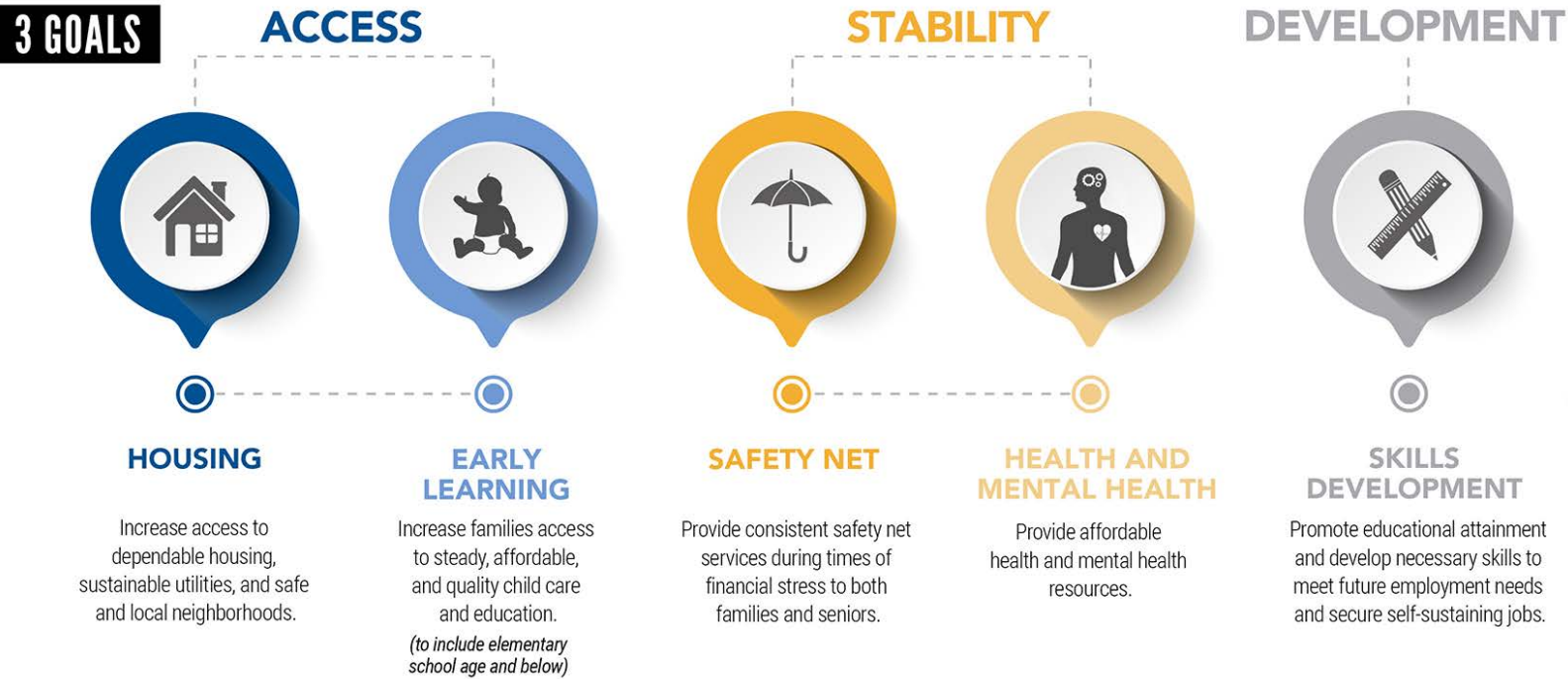
## WHO IS ALICE?

**46 percent** of Florida’s families struggled to pay their bills and keep their heads above the fiscal waters. **54 percent** in the Big Bend alone.

The vast majority of these families work hard to earn a living. Many work one or more full-time jobs and earn enough to be above the Federal Poverty Level, but they are still barely treading water. We call these families and workers **ALICE**, an acronym for **Asset Limited, Income Constrained, Employed**.

Even using the most conservative cost scenarios for a family’s monthly expenses for housing, child care, food, transportation, health care, and necessary technology, these **ALICE** families live on the brink of financial disaster every day – at risk of falling over into debt, or poverty when an emergency comes their way. Unable to pay to repair a broken-down car, for example, they may not be able to get to work and risk losing their jobs, leading to a downward spiral that can put them at risk of going hungry or becoming homeless. When these – or other circumstance beyond their control – occur, **ALICE** households, as well as their communities suffer.

The United Way **ALICE** Report puts a spotlight on **ALICE** families with the goal of helping everyone better understand the challenges the more than 2.4 million **ALICE** households in Florida face every day. The Report stands apart from other studies on low-income families because the methodology is conservative and based on real and current cost data. It also drills down to look at the reasons **ALICE** families face financial hardship. It asks the questions: What can **ALICE** families do to improve their conditions? What can employers do to help their **ALICE** employees? What can communities do to help **ALICE** families improve their quality of life, and at the same time improve the quality of life for all members of the community?



**5 O U T C O M E S**

**WHAT WE DO**

**UNITE**  
We bring together donors, volunteers, businesses, nonprofits, faith-based, community leaders, government, experts, and those in need to address challenges in our community.

**STRATEGIZE**  
We break each problem down to its root cause, and with our stakeholders, develop research-based, comprehensive strategies to make significant and sustainable progress.

**TACKLE**  
Once the strategies are set, it's time for action. We invest in or create initiatives designed to shrink the ALICE population and those living in poverty.

**EVALUATE**  
We create metrics and continuously evaluate the results of our investments, holding every program partner and initiative accountable to make a significant impact.

**UNITED WAY OF THE BIG BEND STRATEGIC DIRECTION**

We have long been the trusted leader in addressing our community's needs but also recognize the importance of staying relevant by keeping up with the ever growing and changing philanthropic landscape.

The most recent United Way of the Big Bend **ALICE Report** provides a clear yet startling picture of our neighbors struggling to make ends meet and of those living in poverty. **ALICE** is the acronym for **Asset Limited, Income Constrained, Employed** – simply put the working poor. On average, **54%** of households in the Big Bend region cannot afford the basic costs of living. This number equates to over **84,000** families struggling day-to-day in the Big Bend.

Our strategic direction positions UWBB to be more effective than ever for identifying and addressing the needs of those living in poverty and the working poor. Our goal is to shrink these populations in the future by focusing our collective resources on Economic Development through Workforce Enablement. This is achieved through the focus of three goals which help this population gain **access** to basic necessities, achieve economic **stability** and **develop skills** to either help gain employment or move up the economic ladder. Under the three goals, we have identified, funding priority outcomes that anchor these goals. They are: **Housing, Early Learning** *(to include elementary age and younger)*, **Safety Net, Skills Development** and the addition of **Health and Mental Health** takes onto

**STRATEGIC DIRECTION**

account the impact that the pandemic has on social isolation, depression, access to healthcare and healthcare disparities. UWBB acknowledges that our seniors are a vital part of our community and will continue to be addressed in areas of Safety net and/or Health and Mental Health.

Join us to learn how we can make a difference!  
**UNITED WE WIN!**



AT UNITED WAY OF THE BIG BEND  
*We're Fighting for...*  
**Safe and Affordable HOUSING**



AT UNITED WAY OF THE BIG BEND  
*We're Fighting for a...*  
**SAFETY NET**



AT UNITED WAY OF THE BIG BEND  
*We're Fighting for...*  
**ACCESS TO QUALITY EARLY LEARNING**



AT UNITED WAY OF THE BIG BEND  
*We're Fighting for...*  
**HEALTH AND MENTAL HEALTH**



AT UNITED WAY OF THE BIG BEND  
*We're Fighting for...*  
**SKILLS DEVELOPMENT**



What is an Employee Campaign Champion (ECC)?

The Employee Campaign Champion (ECC) is the one responsible for planning, organizing and implementing an effective United Way employee campaign within their own company/organization.

The ECC, works to recruit other enthusiastic individuals within the organization and tell the United Way story. In addition to communicating United Way facts, they also ask for and collect pledges from their peers and route them back to the ECC. This “ask” can take in either a one-on-one or group setting and can be creative and fun. Finally, the ECC reports the results to the United Way contact person.

The whole process is facilitated by an educational and support element that is provided through United Way. United Way staff members and Loaned Executives (LEs) are available to assist the ECC and the committee in any way. LE’S are extensions of United Way’s staff who are available to help you with every aspect of your organization’s campaign.



**ECC Responsibilities:**

- Attend one training workshop.
- Recruit an enthusiastic team (for larger employee groups) to help plan and implement a fun, successful campaign.
- Work closely with United Way staff or LE to establish organizational campaign goals, timeline and plan of action.
- Evaluate the campaign, submit final reports and make recommendations for next year.
- Maintain accurate campaign results and report them promptly to United Way.
- Follow-up thoroughly on all aspects of the campaign and thank all employees.
- Announce the results to the entire organization.

# 8 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN



**CONGRATULATIONS** on being selected as your company’s Employee Campaign Champion (ECC). Not only are you providing a tremendous service to your company, but your efforts will also make a difference – improving lives and building a stronger community. The United Way of the Big Bend (UWBB) Campaign staff are ready to assist however possible. Please visit [uwbb.org/toolkit](http://uwbb.org/toolkit) or simply call one of our Campaign Managers. We look forward to working together. **United We Fight. United We Win!**

**STEP 1:**



**RECRUIT & TRAIN YOUR TEAM**

**A. Recruit**

- Consider forming your campaign team around company structure, i.e. departments, work groups, or geographically.
- Your campaign team can help spread enthusiasm and information about United Way and your company campaign.
- Even if your organization is small, it is beneficial to have help with the campaign.

**Good Team Members:**

- Are enthusiastic members of last year's team
- Benefited from, or volunteered for, a United Way program
- Represent a variety of departments in your company
- Coordinate the company newsletter, public relations, communications, or marketing
- Are labor Union leaders (if appropriate)
- Are members of the UWBB's Leadership Society

**B. Train**

On-site training for your team is available in any time increments. These trainings can even be done in "Lunch and Learn" style. Trainings are customized to your organization's environment and designed to help you choose strategies and messages that will work in your organization.

What better way to drive home the message of United Way than to hold your campaign training and then work on a service project to benefit the recipients. Employees can see the variety of services the program offers and the clients it helps. Their day can also include lunch and instruction about the roles of the campaign team.

**HELPFUL HINT**

The number one reason that people do not give to charitable organizations is because they are not personally asked to do so.

Who knows how many of the people you ask to give this year will do so just because you made the extra effort?

**STEP 2:**

**MAKE YOUR PLAN**

**A. Pre-Campaign Checklist:**

- ▣ Meet with your CEO to confirm his or her commitment
- ▣ Attend Employee Campaign Coordinator training
- ▣ Review past performance, determining strength and weakness of previous campaign
- ▣ Recruit and train a campaign team
- ▣ Meet with your internal campaign team and/or United Way representative to develop campaign goals and strategies
- ▣ Develop a theme and/or the United Way's theme
- ▣ Set dates for employee meetings and agency tours
- ▣ Develop an incentive program
- ▣ Send communications from CEO endorsing/announcing campaign
- ▣ Publicize the campaign
- ▣ Plan leadership event
- ▣ Meet with Human Resources to discuss Retiree Program and New Hire Program

**B. Evaluate Past Performance**

Schedule a meeting with your United Way representative to review a data analysis of the past year's campaign. Additionally, think about the answers to these questions based upon last year's campaign:

- In what areas/departments did your campaign work well?
- What are your most likely areas of improvement?
- What community issues are most important to your company?
- How was Leadership Giving emphasized?

**C. Set Challenging Goals & Plan Your Strategy**

It's important to establish a campaign-giving goal that encourages employee motivation

and a sense of accomplishment. Consider a goal based on one or more of the following suggestions:

**Goal Planning**

- Increase employee per capita
- Increase the percentage of employee participation
- Increase the number of Leadership Givers through a specialized Leadership Giving campaign
- Increase community care fund percentage of campaign

**Planning Strategies**

- Create a very public and active campaign to educate all employees about United Way's community impact

**D. Meet With Top Management To Discuss A Campaign Goal & Their Involvement For This Year**

With last year's results in hand and a potential goal in mind, set a meeting with your CEO. Reaching this goal depends, to a great extent, on the commitment of your CEO. The following best practices will turn your CEO into a champion of the United Way campaign:

- Present campaign materials for both Leadership and Employee Giving (United Way can provide you with this information).
- Request the time and resources needed to hold a fun, educational, non-coercive campaign that asks every employee to invest. The more involved your CEO is in these processes, the more likely employees are to get involved as well.
- United Way staff and top volunteers are available to meet with your CEO and discuss your campaign.
- Ask your CEO what outcome area they would like to embrace and plan your campaign around it.



## DEVELOP YOUR CAMPAIGN

### Awards

Everyone likes to be recognized and this year we are making it easy with a pdf you can fill in with recipient's name and the signer's title.\*

- Workplace Donor Certificate of Recognition

\* Visit [uwbb.org](http://uwbb.org) for a full listing of all our recognition awards.

### Pacesetter Campaign

#### What is a Pacesetter?

Pacesetters are organizations that conduct successful UWBB Pacesetter campaigns early to "set the pace" for upcoming campaigns. To participate, organizations agree to meet specific Pacesetter criteria and report their campaign results by September 30. Pacesetters demonstrate extraordinary community leadership, and by participating, they are eligible for additional recognition.

#### Benefits

- Identified as a Pacesetter at the UWBB Annual Community Meeting
- Company recognition on UWBB social media channels
- Eligible for Pacesetter award recognition
- Organization name appears in community-wide, thank-you ad in the local paper, and chamber of commerce

#### Eligibility Criteria

To be acknowledged as a Pacesetter, organizations agree to the following criteria:

- Report results to UWBB by September 30
- Conduct a model campaign and incorporate appropriate UWBB best practices

#### Why Organizations Participate

- Increases employee morale, retention, team-building activities, and community awareness
- Develops a sense of ownership for employees
- Fulfills corporate initiatives

## FunRaising Guide 'FUN' Raising Ideas for Your Workplace Campaign

### Leadership Giving Societies

#### United Way Tocqueville Society

Across the country, leadership giving is the fastest growing segment of The Tocqueville Society is a national association of major donors who support health and human service programs through United Way. The Tocqueville Society was inspired by the observations of the French historian Alexis de Tocqueville, who wrote about Americans' unique spirit of philanthropic association and voluntary effort for the common good. This spirit lives at the very heart of United Way.

#### United Way Community Society

United Way acknowledges that there are individuals in the Big Bend who are prepared to move to a major gift level. By establishing the Community Society, we are able to recognize these extraordinarily generous contributors to our community.

#### United Way Leadership Society

Across the country, leadership giving is the fastest growing segment of most company workplace campaigns. Recent surveys suggest companies that have a leadership-giving program in place experience, on average 20 percent higher employee per capita giving than companies not using this technique.

#### Leadership Society Giving Levels

Tocqueville Society—\$10,000 + • Community Society—\$5,000-9,999 • Leadership Society—\$1,000-4,999

### Leadership Giving Membership Groups

United Way is proud to offer special infinity groups.

#### WOMEN UNITED

WU offers a forum for women who want to significantly improve the quality of life in the Big Bend through leadership giving, advocacy and volunteerism. It's about networking with like-minded women to learn more about the many community needs and social service organizations served through United Way of the Big Bend.

#### YOUNG LEADERS SOCIETY (YLS)

The YLS is comprised of young professionals with a passion for partnership in community building and outreach. YLS works to connect young professionals with volunteering and networking opportunities by hosting community fundraisers and organizing volunteering opportunities with our program partners.

#### STUDENT UNITED WAY

Student United Way is a collection of students across our local public and private elementary, middle and high schools in addition to our local colleges with a passion for partnership in community building and outreach.

**CONTRIBUTIONS AT LEADERSHIP LEVELS WILL GO A LONG WAY TOWARD MAKING PERMANENT AND SUSTAINED CHANGES FOR OUR NEIGHBORS IN NEED.**





## Conduct A Leadership Campaign

### 1. Recruit Leadership Coordinator & Team:

- Recruit a respected senior staff member and current leadership giver to act as a leadership coordinator and conduct the Leadership Giving Campaign.
- The leadership coordinator should work closely with the employee campaign coordinator to ensure optimum results.
- Depending on the size of your company, consider recruiting additional individuals to help by asking your senior staff member or the CEO to help determine the best candidate/s.
- Involving others will lead to increased participation and awareness.

### 2. Host a Leadership Engagement/Recruitment Event

#### What to Look For in a Leadership Giver

- Well respected by his/her peers
- Personable, enthusiastic and highly organized
- A leadership level giver
- A team player and a leader

### 3. Plan Your Leadership Giving Program:

- Establish the timing of the Leadership Giving Campaign.
- Review last year's efforts and results.
- Set a realistic and attainable goal for new leadership gifts and total leadership giving.

### 4. Create a Prospect List:

Work with your UWBB representative to set criteria for soliciting potential leadership donors. Consider:

- Employees who gave at leadership levels last year.
- Current donors of \$500 or more.
- Employees who hold senior management positions.
- Employees receiving stock or stock options as part of their compensation package.
- Employees who express interest and have potential to give at the leadership level.
- Retirees who were past donors; invite them to continue leadership roles.

### 5. Communicate:

- Develop and publicize the company goal for leadership giving in addition to the overall campaign.
- Invite prospects to a special breakfast, luncheon, or reception to present benefits of leadership giving. See "Leadership Giving Presentation: Sample Agenda."
- Distribute brochures, pledge cards and other appropriate information. When possible, personalize the materials with the individual's name.

### 6. Thank Your Contributors:

- Send a thank you note to contributors and members of your team.
- Suggest that your CEO host a reception to acknowledge and thank leadership contributors.

## Leadership Giving Presentation: Sample Agenda

The most successful leadership campaigns take place one to two weeks prior to the kick-off of your general campaign. They help set the pace for your entire United Way campaign.

The purpose of the leadership presentation, usually hosted by the CEO or Leadership Giving Chair, is to provide information about the work of United Way and to ask employees to consider giving at a leadership level. Current leadership donors are asked to consider increasing their gifts.

United Way of the Big Bend is available to help you plan all parts of your leadership giving solicitation. A sample agenda of an effective leadership presentation follows:

### Part I: CEO/ Senior Staff/Leadership Campaign Chair

- Welcome
- Explain why attendees were invited to the meeting
- Explanation of company's responsibility to the community
- Personal endorsement of United Way

### Part II: Employee Testimonial

Employee who is a current leadership giver & beneficiary of services is ideal; if no employee is available to speak, the campaign video provides a powerful testimonial.

- How United Way touched his/her life
- Why United Way is important to the community
- Why he/she gives

### Part III: United Way Volunteer (Approximately 6-8 minutes)

- Update on United Way
- Explain levels and payment options for leadership gifts
- A specific request that meeting attendees consider a pledge at leadership levels

### Part IV: Company Representative/CEO (Approximately 2-3 minutes)

- An announcement that the corporate gift and the CEO's gift have been made
- Campaign timeline, other information
- Offer to address questions, comments, etc.
- Thank colleagues for their attention
- Make a direct ask for leadership gift





## PROMOTE & EDUCATE

You have planned; now it is time to put the plan into action! United Way is more than just an annual campaign. Consider promoting volunteer opportunities so that employees may see first-hand how hard their donations are working. Read about ways to keep United Way active for your employees throughout the year.

### Year-Round United Way Awareness

United Way-supported programs are helping people all year long. The more you know about United Way, the easier it is to see why United Way is the best way to give and the best way to care for people in our community. \* See *FunRaising Guide for suggestions!*

#### Promote

- Send reminders about meeting dates and times
- Don't forget e-mail and voice mail messages (some sample e-mail messages are included on the ECC page at [uwbb.org/toolkit](http://uwbb.org/toolkit))

#### Educate

The core to implementing and managing your campaign is to share information about UWBB's impact with your colleagues, such as Statistics, Success Stories, videos, etc.

The key elements to include in your campaign plan are:

- Community Volunteer Project (coordinated with your UWBB Campaign Manager)
- Agency Representative speakers (coordinated with your UWBB Campaign Manager)
- Agency Tours (coordinated with your UWBB Campaign Manager)
- Printed materials, publications, reports, displays and banners
- Special events that creatively engage employees in the campaign
- United Way success stories in your company newsletter
- Community Impact presentations during employee meetings and Community Impact statistics (coordinated with your UWBB Campaign Manager)

### United Way is More than Just an Annual Campaign.

Look for opportunities to provide year-round information about United Way and the impact of the funded programs. Consider promoting volunteer opportunities so that employees may see first-hand how hard their donations are working. Read about ways to keep United Way active for your employees throughout the year.

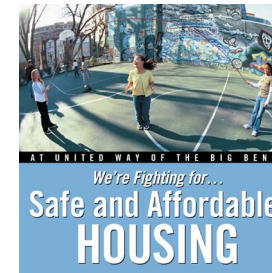
### Let's Get Social!

See our Social Media Guide for FUN ways to share how your company Lives United year round. [uwbb.org/toolkit](http://uwbb.org/toolkit).



### Community Impact

We all have a stake in creating a healthy and prosperous community. We focus on the things that everyone needs for a good life: a quality education that leads to a stable job, and enough income to support a family through retirement. We bring together the people and organizations from across the community who share in our vision and have the energy, expertise, and resources to get the work done. They are essential to our success and the success of our community.



### UWBB COMMUNITY IMPACT INITIATIVES

**Volunteer Income Tax Assistance (VITA) Program** offers free tax preparation by IRS-certified volunteers at sites throughout the Big Bend. This fast and free service helps Big Bend residents avoid predatory income tax preparers and costly refund anticipation loans. VITA ensures that eligible families take advantage of the Earned Income Tax Credit (EITC) which can increase a family's annual income by as much as 15 percent.



**Smile United** this program is a pediatric dental initiative that helps ensure children have access to the dental care they need. Serving all Title I schools in Leon and Gadsden County, SMILE UNITED provides dental assessments, dental cleanings, sealants, oral health instruction, fluoride varnish, and oral hygiene kits at **no cost to students**.



**ReadingPals** volunteers commit to read an hour a week throughout the school year to help children improve their literacy skills.

**MathPals** is a partnership between UWBB and Leon County Schools (LCS) aimed at helping struggling third graders at LCS schools master fundamental skills needed to help them succeed in math.

# SENIOR RETIREES NEW

## New Hires and Retiree Giving Programs

**ONE SINGLE GIFT TO THE UNITED WAY IMPACTS CRITICAL ISSUES ACHIEVING VISIBLE RESULTS.**

### New Hires Program:

Even though you have achieved your campaign goal, some of those pledges will be lost due to normal employee turnover. Meet with your organization's personnel department in regard to implementing a new hires program. Being given the opportunity to contribute is a first step in demonstrating your company's commitment to social responsibility for the Big Bend. This year-round cultivation of new employees reduces losses due to turnover and makes the Employee Campaign Coordinator's job a lot easier. Special materials are available to assist in your New Hires Program. Contact your United Way representative for details.

### How You Can Help

Here is a list of suggestions that we encourage you to implement to help make your New Hires Program successful:

- Issue New Hires brochures during new employee orientation and training
- Show United Way video during new employee orientation and training
- Invite a United Way representative to give a brief presentation during New Employee orientation and training
- Offer employees who are exiting the organization to encourage them to continue their pledges if they are contributors
- Send a personal message from the organization's CEO to welcome new employees to their new jobs and provide a message of support for United Way's Community Fund

**DON'T FORGET...** that United Way staff support is always available to help you continue to deliver the United Way message to new employees.

### Retiree Giving Program:

Retirees provide an excellent resource for increasing your organization's United Way campaign results. Many companies in our community already include retirees in their campaign and report generous support.

The workplace campaign is a logical vehicle for educating and updating retirees about United Way. Since many retirees contributed to United Way throughout their working years, providing them with the opportunity to stay involved and to continue giving is a natural extension of a long-standing relationship.

### Who Benefits from the Retiree Giving Program?

#### The Organization:

- Confirms the organization's commitment to building a strong community and enhances its image as a "concerned citizen" by involving retirees in the effort
- Builds retiree relations by providing a channel for communication
- Reinforces the retirees identification and commitment to company causes
- Provides the opportunity to expand the base of United Way contributors

### Helpful Hint

Sample letters for a variety of different needs are available on the United Way website, [www.uwbb.org](http://www.uwbb.org).

Be sure to make use of these most valuable tools.

# SENIOR RETIREES



### The Retiree:

- Provides retirees with a trusted avenue for impacting their community through charitable contributions
- Communicates important information about health and human services in our community

### United Way of the Big Bend and Our Community:

- Increases campaign giving to support the programs that address the Big Bend's most vital concerns
- Provides a vehicle for communicating to retirees so that their needs can be better served
- Broadens the base of United Way contributors

### Key Elements of a Successful Program:

Successful retiree solicitation programs share the following common elements:

- A letter signed by the CEO and a retiree is sent to your retirees. In the most successful solicitations, the letters are personalized. This is especially effective when the retiree is personally known by a sender
- Information about United Way, a personalized pledge form and any special campaign materials developed by your organizations are included with the letter. A return envelope ensures that gifts are returned to the correct location
- Pension payroll deduction is offered for the retirees convenience in making a gift
- A system is in place to track retiree contributions
- A "thank you" letter is sent to all contributors and volunteers

**TALK TO YOUR UNITED WAY CAMPAIGN MANAGER FOR MORE DETAILS ON THE RETIREE GIVING PROGRAM.**





## EMPLOYEE ENGAGEMENT

Change doesn't happen alone – and it doesn't happen just through fundraising. Every year, United Way's volunteer and community engagement department offers groups and individuals hundreds of community service events in partnership with our local agencies.

### Benefits of volunteerism

- Enhance teamwork skills
- Provide hands-on training opportunities through skill-based projects
- Increase leadership skills
- Increase productivity
- Provide a service and or product to the community
- A priceless sense of pride and accomplishment for your community

There are two type of ways you can volunteer through United Way of the Big Bend:

### Group Volunteering

United Way will help connect your employee teams, social groups, service organizations, families or friends to meaningful volunteer experiences that impact lives within our focus areas. Whether it's one-day activities or quarterly projects, our United Way staff is available to assist you through the entire process.

### Individuals

In addition to group opportunities, there are several individual community-service options available. Options include reading to first graders, mentoring students in math, helping file taxes, assisting with financial education workshops, and much more.

STEP 5:

# CAMPAIGN KICKOFF



## KICK OFF YOUR CAMPAIGN

### Advantages of Conducting Group Presentations:

- Information is provided quickly and efficiently
- A meeting provides a format so that a consistent message is delivered
- Less follow-up work is required when you collect pledge forms at the end of a meeting
- These meeting accommodate the work schedule of all of the organization
- Prospective contributors are removed from work-area distractions
- A forum for questions in a comfortable setting with your United Way representative

The most common and effective way to provide your employees with information about United Way and out impact in the community is at a group meeting. Meetings vary in time and content, but most include the following components.

**REPORT AND POST CAMPAIGN RESULTS PUBLICLY  
SO EMPLOYEES CAN SEE THEIR PROGRESS!**

### The 15-Minute Meeting

#### 1. Welcome (2 Minutes)

Campaign Coordinator welcomes employees and explains the purpose of the campaign and how the company will support the campaign (company activities).

#### 2. Endorsement by CEO (2 Minutes)

CEO or high-level executive provides statement of company support and details of corporate gift. This establishes the corporate commitment to United Way and encourages company-wide participation.



#### 3. Campaign Video (1-3 Minutes max)

Watch the campaign video to raise audience awareness and encourage them to actively support their community by giving to United Way.

## STEP 5: KICK OFF YOUR CAMPAIGN (continued)

### 4. Overview of United Way (3 Minutes)

United Way representative provides an overview of United Way and the impact of donations. This informs the audience of the needs in this community and offers them the opportunity to participate in addressing those needs.

### 5. Testimonial or Community Impact Speaker (3 Minutes)

Hear from an employee who was helped or benefited by United Way or from an Agency speaker about how United Way makes lasting, positive change in people's lives.

### 6. The "Ask" (2 Minutes)

The Employee Campaign Coordinator (ECC) and the United Way Representative ask employees to complete their pledge form, describe incentives (optional), answer questions, collect pledge forms, and "thank" everyone. The ECC encourages the audience to take an active role in making the Big Bend area a better place to live and work by supporting United Way's workplace campaign.



## DEVELOP YOUR CAMPAIGN TIMELINE

### PLAN

**We recommend starting to plan your campaign six weeks before the start date.**

- Connect and work with your UW Campaign Manager or Loaned Executive to review last year's campaign and develop this year's campaign strategy.
- Secure CEO and Senior Management support, including written endorsement (letter/email).
- Recruit your campaign team.
- Host a planning meeting with campaign team to brainstorm ways to make this year's campaign success.

### KNOW YOUR ORGANIZATION

**Knowing your organization's United Way histories gives you a place to begin.**

- Talk to last year's Employee Campaign Champion (ECC). Find out what worked and what didn't work in your organization.
- Work with your CEO to set a campaign goal based on the number of employees you have and last year's campaign performance.

### GEAR UP

**Your campaign plans should be solidified in the two weeks prior to the start of your campaign.**

- Finalize your campaign calendar, including activities, contests, and giveaways.
- Hang posters and make other materials available to employees.
- Make a gift yourself. It is easier to ask others to give when you have given.
- Begin campaign promotion:
  - CEO letter to employees/CEO video to employees
  - ECC letter to employees, including campaign calendar and details about activities.

### RUN YOUR CAMPAIGN!

**We suggest running your campaign for 2 weeks: enough time that you don't miss anyone who may be on vacation for a week, but short enough to keep momentum and enthusiasm high. If you have a large company, 2-3 months is a more realistic timeframe for your campaign.**

- Host your kickoff meeting/event (typically at a staff meeting).
- Host UW speaker to share this year's campaign message (can be part of kickoff event).

- Ensure all employees get donation information (pledge forms, text to give options, UWBB Flyer/Brochure, program provider list).
- Make sure EVERY employee is asked to consider making a pledge. Don't forget employees who work off-site, travel extensively, or are on alternate shifts.
- Host your activities, contests, etc. according to your campaign calendar.
- Send follow up emails to remind people of activities, track progress, and maintain enthusiasm.
- Send a "last call" email (final days of campaign).

### WRAP UP

**Please turn in your results following your campaigns. United Way works on pledges, so it is vital for us to get your envelopes (campaign total and or rollover total) prior to us closing the campaign at the end of March. All donations in at that time will be what we base our campaign total on and allocate funds to our program partners.**

- Collect all pledge forms, ensuring they are all signed. Your payroll department should keep all original pledge forms. UWBB should get copies. All individual gifts (not payroll), should be accompanied by a completed pledge form. If they are not, all funds will be automatically directed to the Community Campaign Fund.

### Complete the following steps:

- Make copies of pledge forms and place in your campaign envelope.
- Give original pledge forms to your HR/payroll department.
- Calculate results and complete "Campaign Report Envelope".
  - Be sure to separate payroll pledges, leadership gifts, checks and cash.
- Contact your United Way representative and coordinate a time pick it up. Please do not mail your envelope.
- Report final results to your colleagues and thank them with a wrap up event or in another fun way. Your certificate/plaque will be provided to your company based on the amount raised. This takes place in August each year at our Annual Community Meeting.
- Conduct a campaign debrief with your UW representative, including determining next year's ECC and tentative campaign dates.

## WORKPLACE CAMPAIGN BEST PRACTICES

### 1. Campaign Time Line

Select a two week period between August and early December to facilitate your workplace campaign. Earlier will provide you more lead time for your payroll department to process payroll deduction information. \*Option: Participate in a Frontrunner/Pacesetter Campaign.

### 2. Campaign Goal

- Set a campaign goal of 10% to 20% increase over last year – work with United Way staff or Loaned Executives on ways to reach your goal.
- Ask members of your leadership team/executive management to consider giving a Leadership Gift.
- Ask employees who currently donate to consider giving \$1 more per pay period. Ask employees who do not already give, to donate \$1 per pay period. Let them know that every dollar makes an impact. Include criteria for goal setting: S.M.A.R.T. (Specific, Measurable, Attainable, Relevant, and Timely).

### 3. Personalize United Way Pledge Forms

Ask your HR or Payroll Department to help personalize pledge forms with employee contact information

### 4. Hold Campaign Kickoff Event or Kickoff Day

- Encourage Employees to make their gift on the **Kickoff Day!**
- Ask United Way staff for ideas on how best to kickoff your campaign or create awareness. \*See FUN-Raising Guide
- Tag United Way of the Big Bend in photos of your campaign kickoff events on social media, with you celebrating your donors, etc.

### 5. CEO and Campaign Team Follow Up

- Ask your CEO or members of your campaign team to join you in sending follow up emails to employees after distributions of pledge forms.
- Provide incentives. For multiple incentive or raffle drawings, encourage employees to return their pledge early to be eligible for more giveaways. (Raffle prizes could include parking spaces near building, 1 hour or more paid time off work, lunch with the CEO, gift certificates, etc.) \*Must involve CEO/Executive team in this, you will need their approval.
- Facilitate special events (e.g. Dress Down Days) to create awareness and raise funds
- Use a graph or pie chart to keep employees updated about your internal campaign status. \*Be sure to visit [uwbb.org/ECC-Resource](http://uwbb.org/ECC-Resource) for tips, tools, etc.

### 6. Campaign Deadline Update

- Send reminder email letting employees know deadline to return completed pledge forms and eligibility for raffle drawings/prizes.
- Ask UWBB staff or Loaned Executive for facts or success stories that can be included in these updates. \*Be sure to visit [uwbb.org/ECC-Resource](http://uwbb.org/ECC-Resource) for tips, tools, etc.

### 7. Campaign Paperwork Collection

- Place a copy of the pledge forms, and any money into a Campaign Envelope. Multiple Envelopes can be provided if necessary. Submit your completed envelope to UWBB employee or Loaned Executive. If you have separate “Special Event” money, please place that in a separate envelope and label it.
- Do NOT leave cash or checks in your desk drawer or car overnight.
- Turning in multiple envelopes throughout your campaign is encouraged so cash and checks do not sit. Just mark “Partial” on your campaign envelope and turn it in.

### 8. Thank You Event/Campaign Finale Communication

- Hold a thank you event or thank you day to create awareness of employee support and impact.
- Invite a representative from UWBB or Loaned Executive to attend.
- Tag United Way of the Big Bend in your Celebration photos. Use hash tag #LiveUnited #UWBB #community #UnitedWeFightUnitedWeWin
- Showcase your United Way award so everyone has chance to see how your company/department is making an impact in our community or changing Lives in our community.



### 9. Hold Campaign Kickoff Event or Kickoff Day

- Coordinate a team of employees to participate in a volunteer project
- Encourage your employees to volunteer in the following ways:
  - Campaign Team Member
  - Investment Team Member
  - VITA Volunteer
  - Reading/Math Pal
  - Women United
  - Young Leaders Society
  - Loaned Executive

## STEP 6:

# THE RESULTS

### Here's How You Get Started:

- Collect all employee pledge forms
- Review all information for completeness, accuracy and for signatures.
- Sort all pledge forms by method giving (i.e., payroll deduction, cash, checks) and separate them.

### Completing the Campaign Report Envelope:

On the left side of the envelope, fill out your company's information.

- If your campaign is completed and you do not expect to collect more contributions, then check the box labeled "Final Campaign Envelope Report"
- If you plan on continuing to raise funds and submit future envelopes, then check the box labeled "Partial Campaign Envelope Report"

On the right side of the envelope, fill out the amount of money your company has raised. First, you will need to separate your contributions by the type of contribution or pledge it is.

- **Employee Payroll Deduction:** the total of annual deduction amounts of all employees who are choosing to contribute through payroll deduction.
- **Other Employee Pledges:** the total contribution amount of employees that chose to give through a variety of other methods:
- **Employee Cash:** the total contribution amount paid with cash
- **Employee Checks:** the total contribution amount paid with by check
- **Employee Credit Cards:** the total contribution amount of all pledge forms that have credit card information
- **Employee to Be Billed:** the total contribution amount of employees that wish to be billed
- **Corporate Donation:** the total contribution amount that your company has donated to the United Way
- **Special Events:** the total contribution amount raised from various events your company has hosted, including, but not limited to, bake sales, raffles, auctions, etc.
- **Envelope Total:** the total contribution amount your company has collected on behalf of the United Way. Just add the totals listed in rows A (Payroll Deduction), B (Other Employee Pledges), C (Corporate Donation), and D (Special Events). Please be sure to fill out "Total of only Cash and Checks," which is the total dollars, cents, and checks included in the sealed envelope.

Please do not retain cash and checks from more than two weeks and attach payments to pledge forms using paper clips. **Be sure that employees fill out a pledge form to receive proper recognition for their gift.**

## DON'T FORGET

Keep your United Way staff representative advised of preliminary results as the campaign progresses and report final results as soon as they are available. Your promptness in reporting ensures that United Way has the information needed to project the dollars that will be available for allocation to programs, and to accurately recognize your organization's achievement at our Campaign Finale.

## STEP 7:

# HELP UNITED WAY OF THE BIG BEND SAY THANK YOU!

### Here are some ideas:

- Send letters of appreciation to committee members or order a gift from the United Way Catalog
- Hold a "thank you" event/meeting for all employees and announce campaign results
- Consider a special thank you event for all givers – especially Leadership Givers
- Send a thank you letter from your CEO or a senior manager to all contributors
- Feature your campaign results in an employee publication
- Schedule a celebration for your company and invite your United Way staff to recognize your success
- Plan to attend United Way's Community Luncheon with your team

# SAY "THANK YOU"

# THANK YOU!



## EVALUATE YOUR CAMPAIGN

- ▣ Determine strengths and weaknesses of your organization's campaign
- ▣ Conduct an overall assessment/evaluation of the campaign with your team and develop a written summary for next year's Employee Campaign Coordinator.
- ▣ Request New Hires packet and give to Human Resources Department for employees hired after the campaign
- ▣ Tabulate the results and submit campaign reports to United Way
- ▣ Give payroll deduction forms to payroll department, and make a copy for your United Way Campaign Envelope
- ▣ Publicize campaign results
- ▣ Conduct a **"thank you"** program for all contributors
- ▣ Conduct campaign evaluation with your team and develop a written summary for next year

# QUESTIONS

## FREQUENTLY ASKED QUESTIONS (FAQS)

### 1. How is United Way of the Big Bend governed?

A local, volunteer Board of Directors makes all policy decisions for United Way, while a professional staff administers the day-to-day operations, including measuring the impact of funded programs and reporting results. A volunteer Board of Directors, volunteer committees and approximately hundreds – all local – unpaid volunteers oversee the operations and help carry out policies for all major functions of United Way.

### 2. How is United Way making sure my donation is well spent?

Investing in United Way is the best way to be certain that your dollars are well spent. More than 100 local, unpaid volunteers rigorously review programs for measurable results, financial stability and appropriate use of United Way funding. These volunteers study the most serious human service issues of our community and determine the best ways to make a meaningful impact on these problems. The issues facing today's society are increasingly complex, requiring a coordinated community-wide response; your gift ensures that your crucial resources fund comprehensive solutions.

### 3. What is United Way of the Big Bend's relationship with United Way of America?

United Way of the Big Bend is a separate, local organization governed by a local, volunteer, Board of Directors. United Way of America is a service association to which local United Ways belong. Through this affiliation, United Way of the Big Bend receives services such as staff and volunteer training, data, campaign analysis, market and performance research, advertising, human resources assistance, and national campaign data and comparisons.

### 4. I give to my church and several other local charities. Why should I give to United Way?

The local charities you support cannot address all the needs of our community. Giving to the United Way addresses our community's most pressing health and social services needs. Many companies offer an employee match on the gift, so giving at the office is in some cases a way to double your gift. Payroll deduction offers convenience and an opportunity to spread the financial impact of your gift over a one-year time period.

## FREQUENTLY ASKED QUESTIONS (FAQS)

### 5. What are my choices for giving?

#### OPTION A: Community Impact Fund

Allow volunteers to distribute funds to meet the most critical needs in Franklin, Gadsden, Jefferson, Leon, Liberty, Madison, Taylor, and Wakulla counties.

#### OPTION B: Community Outcomes

##### HOUSING

Increase access to dependable housing, sustainable utilities, and safe local neighborhoods

##### EARLY LEARNING

Increase family access to steady, affordable, and quality child care and education

##### SAFETY NET

Provide consistent safety net services during times of financial stress

##### HEALTH AND MENTAL HEALTH

Provide affordable health and mental health resources

##### SKILLS DEVELOPMENT

Promote educational attainment and develop necessary skills to meet future employment needs and secure self-sustaining jobs

### 6. What is United Way's policy against pressuring employees to give?

United Way of the Big Bend is against coercion. Its policy states that under no circumstances should an employee be threatened or coerced into contributing. Giving is a personal matter and a personal decision; whether people give and how much they choose to give is up to each individual. The purpose of United Way is to offer people an opportunity to help others through their giving. We hope you will contribute because you are able to and because you want to make a difference in our community.

### 7. If I stop working, what happens to my pledge?

Should you stop working, your payroll deduction pledge stops too. Your pledge through United Way is made in good faith based upon your employment. You may fulfill the remainder of your pledge by writing a check, using a credit card or having United Way bill you directly. When you start a new job, ask to sign up for payroll deduction again or call United Way at 414-0844 for further details.

### 8. Is my United Way contribution tax deductible?

**Yes**, the Internal Revenue Service has determined that United Way of the Big Bend is eligible to receive tax-deductible contributions under section 501(c)(3) of the Internal Revenue Code.

### 9. How do I find information about agency services when I need help?

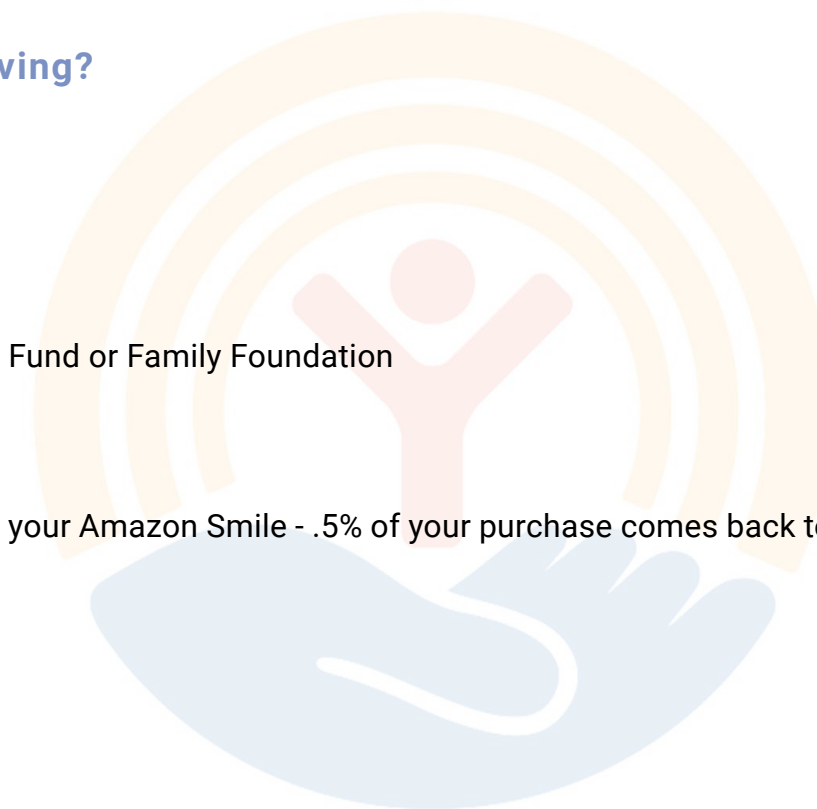
**Dial 2-1-1** for help at any time of day or night, seven days a week. **2-1-1** is a 24-hour information and referral help line that provides information and assistance to programs and services ranging from child and adolescent mental health counseling to emergency financial assistance.

### 10. What is United Way's overhead?

United Way's overhead calculation meets United Way of America Standards of Excellence and is consistent with not-for-profit reporting. This standard uses the IRS Form 990, giving donors and watchdog organizations easy access to reported data for increased comparability. Using this method, United Way's overhead, based on the most recently filed Form 990 for fiscal year ended June 30, is 17.5%.

### 11. What are my options for giving?

- Cash, Check or Credit
- Online
- Text-to-Give
- Payroll deduction
- Multi-year pledge
- Make a gift from your Donor Advised Fund or Family Foundation
- Make a gift of Life Insurance
- Make an Endowment Gift
- Make a Planned Gift
- Select United Way of the Big Bend on your Amazon Smile - .5% of your purchase comes back to us



**NOTE: The Better Business Bureau's Wise Giving Alliance suggests total fundraising costs not exceed 35 percent of total contributed income and that total fundraising and administrative costs not exceed 35 percent of total income. United Way of the Big Bend is pleased that our overhead costs fall well within this range.**



**UNITED WE FIGHT.  
UNITED WE WIN!**

**LIVE UNITED**

**THANK YOU!**



**UNITED WAY OF THE BIG BEND**

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