



# UNITED WAY PLAYBOOK

CAMPAIGN COORDINATOR 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 and our partners. You are making a difference in the lives of thousands across our community and the Big Bend.

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 fundraising campaign and ways you can roll up your sleeve and make a difference. We hope you find the information helpful.

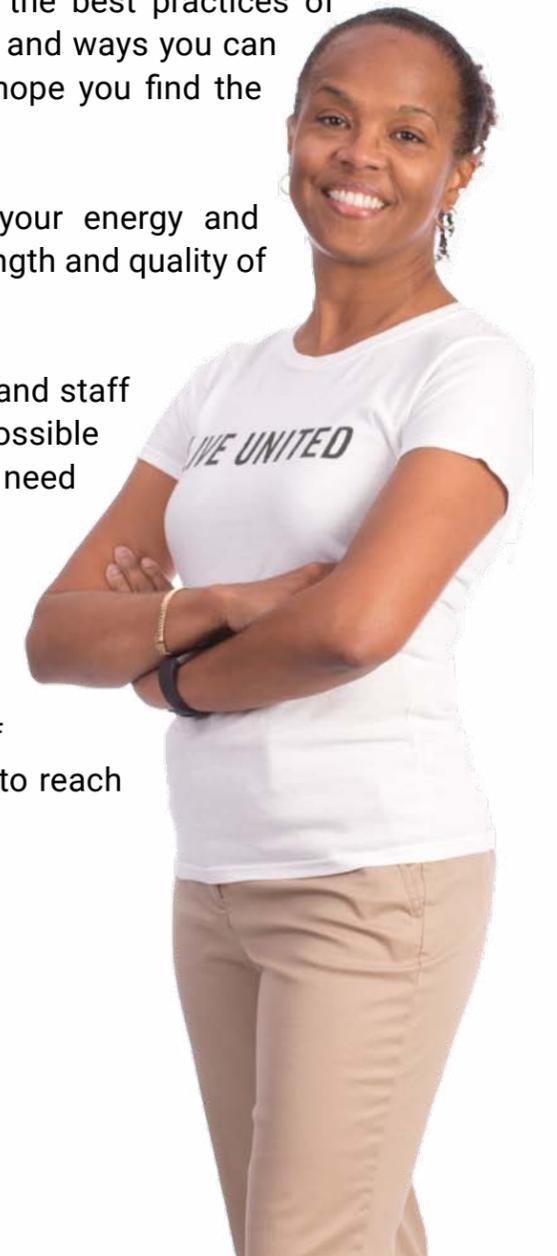
As a philanthropic leader in our community, your energy and commitment will have a direct impact on the strength and quality of life in the Big Bend.

Keep in mind United Way fundraising volunteers and staff members 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,

President & CEO



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## OVERVIEW OF UWBB



There is so much more to United Way of the Big Bend than our fundraising. In this section, you will learn how United Way brings people and resources together to create lasting, positive change in the lives of the children and families in the Big Bend.

United Way is investing in resolving the underlying causes of our community’s most serious problems. Together, we can accomplish more than any single group can on its own.

When we reach out a hand to one, we influence the condition of all, and create a community where children enter school ready to learn, families live in safe homes and neighborhoods, and **every person has the chance to succeed.**

# What is United Way?

United Way of the Big Bend is a nonprofit organization that works to resolve our area's most critical human care problems in order to bring about lasting, positive change in the lives of our children, youth, and families.

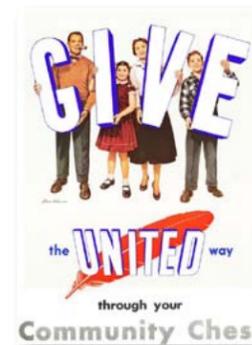


For more than 75 years, United Way has been bringing people together to find answers to our community's toughest challenges. What began in 1943 when citizens assembled in Tallahassee to raise money and make time to help care for vulnerable fellow citizens, is now an area movement involving people from all walks of life in Franklin, Gadsden, Jefferson, Liberty, Madison, Taylor, and Wakulla counties.

From its inception in 1943 to the present, United Way has responded to the increasing severity and complexity of health and human service issues affecting Big Bend residents. It was chartered by nine concerned citizens of Tallahassee for the purpose of raising and distributing funds to charitable and character-building agencies. On June 20, 1990, United Way changed its name and incorporated the seven neighboring counties of the Big Bend region into its service area.

Our founders understood that the needs of the community could not be met by any single organization on its own. Building on their vision, united way has formed partnerships with businesses, funders, government, nonprofit and community organizations to tackle critical issues facing the Big Bend's children, youth, and families.

Over the years, United Way's purpose has remained constant. We are dedicated to supporting the greatest variety of human service agencies in the local area and reaching people from all walks of life and income groups.



# BOLD New Course

For the first time in over 75 years, United Way of the Big Bend is embarking on a BOLD new course. We have identified our community's top priorities and developed a strategy to focus on outcomes that address the chronic needs of the Big Bend.

Be a part of something bigger – join us in our campaign today. Together, we can be the catalyst for change that makes a difference in lives and our community.

## Our Vision

To be the region's trusted leader for addressing our community's most vital concerns

## Our Mission

To raise awareness, mobilize resources and find collaborative, targeted solutions for our community's most vital concerns

## Our Goal

To support the success of families, individuals, and a thriving community

**Katrina Rolle**  
President & CEO  
850.414.0855  
[Katrina@uwbb.org](mailto:Katrina@uwbb.org)

**Molly Lord**  
Vice-President of Resource Development  
850.414.0853  
[Molly@uwbb.org](mailto:Molly@uwbb.org)

**Irvin Chikoti**  
Vice-President of Finance & Operations  
850.413.7345  
[Irvin@uwbb.org](mailto:Irvin@uwbb.org)

**Susan Dunlap**  
Vice-President, Collective Impact  
850.414.0856  
[Susan@uwbb.org](mailto:Susan@uwbb.org)

**Patti Cawood**  
Resource Development Director  
850.487.2087  
[Patti@uwbb.org](mailto:Patti@uwbb.org)

**Stephanie Eller-Vaughn**  
Resource Development Director  
850.487.9807  
[StephanieV@uwbb.org](mailto:StephanieV@uwbb.org)

**Sherri Edmonston**  
Director, HR and Information  
850.414.8827  
[Sherri@uwbb.org](mailto:Sherri@uwbb.org)

**Stephanie McFadden**  
Operations Finance Manager  
805.414.0860  
[Stephanie@uwbb.org](mailto:Stephanie@uwbb.org)

**Swanzetta Green**  
Manager, Administration & Information  
850.414.0862  
[Swanzetta@uwbb.org](mailto:Swanzetta@uwbb.org)

**Rebecca Weaver**  
Director of Impact Strategies  
805.487.8091  
[Rebecca@uwbb.org](mailto:Rebecca@uwbb.org)

**Tod Thomas**  
Director of Communications  
850.488.8341  
[Tod@uwbb.org](mailto:Tod@uwbb.org)

**Alaina Gilpin**  
Resource Development Manager  
850.414.8825  
[Alaina@uwbb.org](mailto:Alaina@uwbb.org)

**Carrie Blackburn**  
Collective Impact Associate  
850.488.8168  
[Carrie@uwbb.org](mailto:Carrie@uwbb.org)

**Marla Holcomb**  
Resource Development Associate  
850.414.0858  
[Marla@uwbb.org](mailto:Marla@uwbb.org)

**Laura Wigglesworth**  
Resource Development Associate  
352.356.1092  
[Laura@uwbb.org](mailto:Laura@uwbb.org)



**What is an ECC?**

The Employee Campaign Coordinator is the one responsible for planning, organizing and implementing an effective United Way employee campaign within their own organization.

United Way volunteers contact the chief executive in local organizations and ask for his or her commitment to United Way. The head of the organization then appoints an enthusiastic person to organize the employee campaign. That person is called the Employee Campaign Coordinator (“ECC”).

The ECC, in turn, recruits other enthusiastic individuals within the organization to contact their fellow employees (on a peer-to-peer basis) 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 with Leadership Giving Chair (LGC) on the company’s Leadership Giving campaign, if applicable.
- 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.
- Work very closely with United Way staff and employees to resolve problems.
- 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 Coordinator (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 the Employee Campaign Coordinators’ tab on our website: [www.uwbb.org](http://www.uwbb.org) or simply call one of our Campaign Managers. We look forward to working together and the success it will bring.

## 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 members of the Leadership Society
- 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)

### 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

- Develop a campaign theme
- 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.



## DEVELOP YOUR CAMPAIGN

### A. 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.

### B. 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 Campaign Kickoff
- Company recognition on UWBB social media channels
- Eligible for Pacesetter award recognition during Campaign Finale
- Organization name appears in community-wide, thank-you ad in the Tallahassee Democrat

#### 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
- Establishes the company as a recognized community leader

### C. FunRaising Guide

**'FUN'** Raising Ideas for Your Workplace Campaign



**CONTRIBUTIONS AT LEADERSHIP LEVELS WILL GO A LONG WAY TOWARD MAKING PERMANENT AND SUSTAINED CHANGES IN PEOPLE'S LIVES,**

### 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.

#### Leadership Society Giving Levels

Azalea Circle	\$1,000-1,999
Dogwood Circle	\$2,000-2,999
Magnolia Circle	\$3,000-3,999
Live Oak Circle	\$4,000-4,999
Community Society	\$5,000-9,999
Tocqueville Society	\$10,000 and above



### D. Leadership Giving Opportunities

#### 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

#### 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.

### E. Benefits of Leadership Giving

#### Community Benefits

- Access to new resources - new dollars from leadership giving donations enhance the ability of UWBB to efficiently respond to emerging community needs.
- Recognition of new community leaders - Leadership donors and volunteers gain recognition for their charitable activities and are acknowledged as community leaders.
- Increased community spirit - Leadership donors have increased pride in the community and desire to participate in community activities.

## 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.

## E. Benefits of Leadership Giving

### Donor Benefits

- Community awareness - A formal leadership giving program incorporates better communication and increases understanding and awareness of community needs.
- Positive image - Leadership donors are perceived as positive role models for their peers who may increase the level of participation and total dollars raised throughout the community.
- Personal satisfaction - Leadership donors lead the way towards making a difference in the lives of many people each and every day.

### Company Benefits

- Positive image - Demonstrates a company-wide commitment to improving lives in our community.
- Employee performance - Leadership giving activities encourages teamwork and enhances relationships by connecting employees with a vision and passion.
- More resources - A company's overall United Way campaign increases, which results in additional community resources that are available to help more people.

## F. Conducting 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. 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.

### 3. 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.

### 4. 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.

### 5. 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.



## G. 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.

#### A. 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](http://uwbb.org)).

#### B. Educate

The core to implementing and managing your campaign is to hold employee educational meetings.

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)

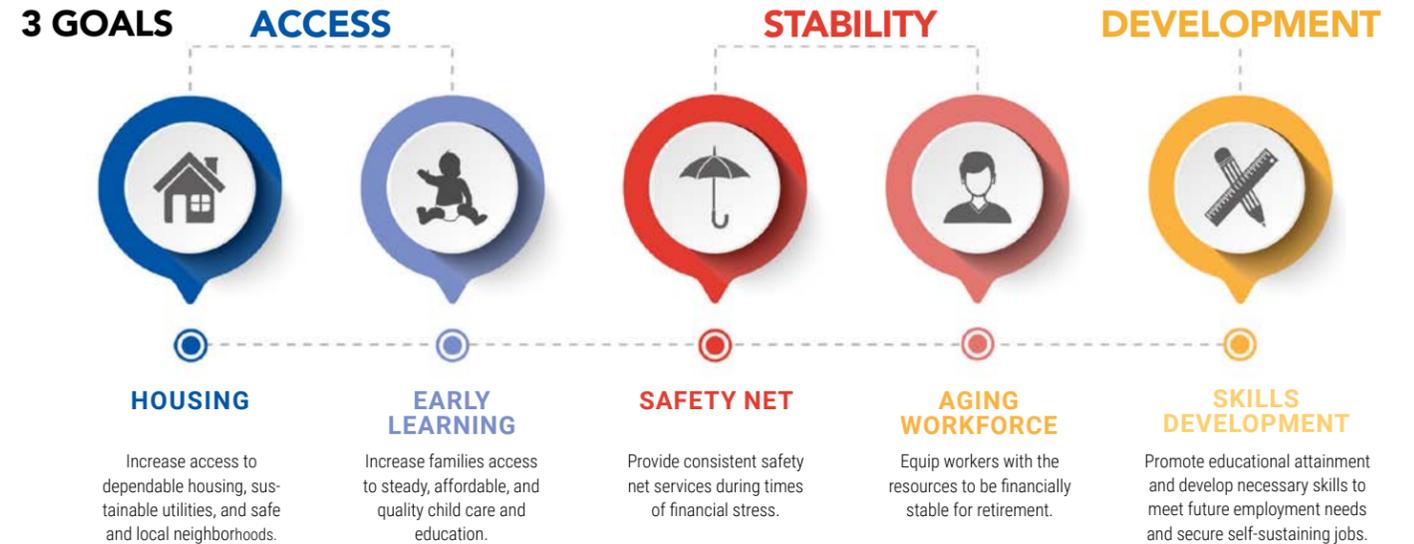
#### C. See Social Media Guide

[uwbb.org/wp-content/uploads/2018/09/2018-Social-Media-Guide.pdf](http://uwbb.org/wp-content/uploads/2018/09/2018-Social-Media-Guide.pdf)



## D. 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, enough income to support a family through retirement, and proper health care. 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.



## 5 O U T C O M E S

### UWBB COMMUNITY IMPACT PROGRAMS

**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.



**Read United** volunteers read to every public school first grade classroom in our eight-county footprint over the course of a week. Volunteers also give each first-grade student a brand new book to take home. For many children, this is the first book they've owned. Over the last six years, over 27,000 books have been distributed through this program.



**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 20 struggling third graders at two pilot schools master fundamental skills needed to help them succeed in math.

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

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### E. New Hires and Retiree Giving Programs

#### 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 pledge cards 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 pledge information to 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.

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#### 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 serious needs
- 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:

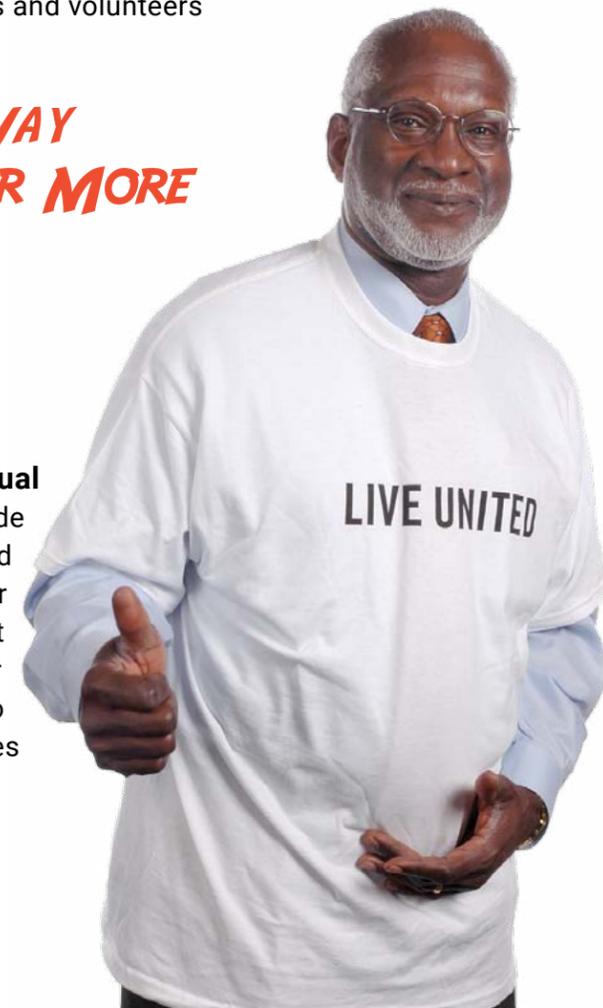
- A letter signed by the CEO and a retiree is sent to your retirees. In the most successful solicitations, the letters are personalized. This is especially effective when the retiree is personally known by a sender
- Information about United Way, a personalized pledge form and any special campaign materials 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.

### F. Engagement

#### 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.





## 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 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 meetings 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 our 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.

## Signature Events

Whether with a group or on your own, United Way and partners collaborate on a number of annual large-scale signature events. Learn how you can be part of these exciting yearly efforts by contacting our volunteer and community engagement team at [unitedway@uwbb.org](mailto:unitedway@uwbb.org).



# DEVELOP YOUR CAMPAIGN TIMELINE

Below is a sample timeline that can be used for a workplace campaign. Your United Way Campaign Manager can help you develop a timeline that's right for your company.

## Four Weeks Before Kickoff

- Have first campaign planning meeting with your United Way Campaign Manager
- Select an Employee Campaign Coordinator (ECC)
- Attend ECC training
- Meet with past campaign team to discuss previous campaign successes and challenges
- Conduct executive briefings with senior leadership to choose campaign positions and responsibilities
- Finalize steering team and campaign volunteer structure

## Three Weeks Before Kickoff

- Recruit additional campaign committee members
- Begin campaign team meetings to help develop specific objectives and strategies surrounding business units and special projects campaign communications, volunteer activities, kickoff and celebration, Giving Society campaigns, and so on
- Plan a calendar of educational activities and events
- Begin discussions about using United Way's paper pledge form

## Two Weeks Before Kickoff

- Take campaign committee on a tour of a United-Way-funded agency
- Submit requests to United Way for volunteer projects
- Submit requests for educational speakers
- Finalize discussions about using a paper pledge form
- Set overall campaign goal
- Develop Giving Society strategy, identify prospects, and set events
- Finalize theme and communication plan
- Develop volunteer training schedule, meeting agendas, and materials

## One Week Before Kickoff

- Execute campaign posters, web messages, and other communications vehicles
- Tell United Way stories through articles on your intranet website
- Recruit volunteers for volunteer projects
- Have Tocqueville Society campaign event and begin Tocqueville Society campaign
- Have Leadership Giving chair follow up with prospects
- Have Tocqueville, Leadership and affinity group campaign events
- Have Leadership Giving chair follow up with prospects
- Begin volunteer opportunities

## During Your Campaign

- Have general employee kickoff event
- Deploy campaign leaders to talk about United Way with staff and ask them to consider participating
- Send initial pledge email and reminders, if appropriate
- Share daily campaign tracking report with campaign team
- Host business unit events to raise awareness and increase participation in pledging
- Continue employee education meetings with United Way
- Continue volunteer opportunities

## After the Campaign

- Announce results to all staff
- Hold general campaign celebration
- Send appreciation letters to volunteers
- Thank donors who supported campaign
- Send your campaign results and donor information to United Way
- Hold meeting to discuss campaign outcome and evaluate for next year

# 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:

One 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"

One 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.

# UWBB PLEDGE FORM

# WHEN WE UNITE AS ONE OF MANY WE CHANGE THE LIVES OF MANY

## 1 MY INFORMATION Your personal information is kept confidential and will not be sold or shared at any time.

Mr.  Mrs.  Ms. FIRST NAME M.I. LAST NAME

PREFERRED NICKNAME

HOME ADDRESS HOME PHONE

CITY STATE ZIP CODE

HOME EMAIL ADDRESS DATE OF BIRTH

EMPLOYER WORK EMAIL ADDRESS WORK PHONE

## 2 MY INVESTMENT IN MY COMMUNITY Please select method of payment.

PAYROLL DEDUCTION \$ \_\_\_\_\_ per pay period  # \_\_\_\_\_ pay periods = \$ \_\_\_\_\_

PAYMENT ENCLOSED  Check (payable to United Way of the Big Bend)  Cash \$ \_\_\_\_\_

CREDIT CARD \_\_\_\_\_ / \_\_\_\_\_ \$ \_\_\_\_\_  
CREDIT CARD NUMBER 3- or 4-digit SECURITY CODE EXPIRATION MO/YR

BY QUARTERLY BILLING TO MY HOME ADDRESS (\$60 annual minimum) \$ \_\_\_\_\_

**TOTAL ANNUAL GIFT = \$ \_\_\_\_\_**

## 3 RECOGNITION My contribution qualifies me for the following. (check all that apply)

I am a **Leadership Giver** of \$1,000 or more individually or by total including spouse's gift.  
Spouse's Name \_\_\_\_\_ Spouse's Employer \_\_\_\_\_  
For Recognition, please list my/our name(s) as follows \_\_\_\_\_  Anonymous

I am a **Loyal Contributor!** (I have contributed to a United Way for 10 years or more). Giving to United Way since \_\_\_\_\_ Year

- Please note that leadership giving is personal giving. Corporate gifts are not recognized as leadership gifts unless the company is wholly owned by an individual.
- TOCQUEVILLE SOCIETY (\$10,000 or more)**  
A national society established to recognize the understanding, commitment and support of United Way's most generous and community-minded investors. This is UWBB's most prestigious group of local philanthropists.
  - LIVE OAK CIRCLE (\$4,000 - \$4,999)**
  - MAGNOLIA CIRCLE (\$3,000 - \$3,999)**
  - COMMUNITY SOCIETY (\$5,000 - \$9,999)**  
This society enables UWBB to recognize donors in the Big Bend who are willing to move to a major-gift level and make extraordinarily generous contributions to their community.
  - DOGWOOD CIRCLE (\$2,000 - \$2,999)**
  - AZALEA CIRCLE (\$1,000 - \$1,999)**

- Retiring** — Contact me to continue my annual gift.  **Endowment** — I want to make/ have made an endowment gift.  **Estate Planning** — I included United Way of the Big Bend in my will or Estate Plan

## 4 AUTHORIZATION If you would like to direct your donation, please complete Section 5.

SIGNATURE REQUIRED \_\_\_\_\_ Date \_\_\_\_\_

# THANKS FOR WHAT YOU DO TO LIVE UNITED

To comply with new IRS regulations, if you choose to contribute by payroll deduction, you must retain a copy of this pledge form in addition to your pay stub or W-2 Form to document your gift to UWBB, EIN #59-8011150. No goods or services have been given, in whole or part, for this contribution. Giving is a personal decision. United Way of the Big Bend has a strong policy against coercion. Whether a person gives to UWBB and how much the person chooses to give is up to the individual. Giving voluntarily is fundamental to the United Way concept. "A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE WITHIN THE STATE, (1-800-435-7352). REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE." "UNITED WAY OF THE BIG BEND RECEIVES 100 PERCENT OF YOUR CONTRIBUTION AND RETAINS OR DISTRIBUTES IT AS YOU DIRECT." REGISTRATION CHECKS

## 5 MY IMPACT

- I WOULD LIKE MY DONATION TO SUPPORT:
- OPTION A: Community Impact Fund**
- Allow volunteers to distribute funds to meet the most critical needs
- 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
- Aging Workforce**  
Equip workers with the resources to be financially stable for retirement
- Skills Development**  
Promote educational attainment and develop necessary skills to meet future employment needs and secure self-sustaining jobs

## 6 COUNTIES SERVED

- I WOULD LIKE MY GIFT TO SUPPORT:
- Franklin  Leon  Taylor  
 Gadsden  Liberty  Wakulla  
 Jefferson  Madison

## 7 GET INVOLVED

- I'm interested in learning more about:
- Women United  
 Young Leaders Society  
 Volunteer Opportunities  
 Community Investment Team  
(Reinvesting dollars into the community)



307 East Seventh Avenue,  
Tallahassee, FL 32303  
telephone 850-414-0844  
email [unitedway@uwbb.org](mailto:unitedway@uwbb.org)  
fax 850-414-0852

**UWBB.ORG**

# UWBB CAMPAIGN ENVELOPE

**United Way of the Big Bend Campaign Envelope**

**United Way of the Big Bend Staff Only**

Campaign Log # \_\_\_\_\_

Account # \_\_\_\_\_ County Code \_\_\_\_\_

Faced By \_\_\_\_\_

Date \_\_\_\_\_



United Way of the Big Bend



Please do not retain cash and check contributions for more than two weeks!

Envelope Contents	
Contributions & Pledges	\$\$ Amounts
<b>Payroll</b>	
A. Employee Payroll Deduction Total	
<b>Other Employee Pledges</b> <small>(please use paper clips, not staples, to attach payments)</small>	
Employee Cash	
Employee Checks	
Employee Credit Cards	
Employee to Be Billed	
B. Total of Other Employee Pledges	
<b>Corporate</b>	
C. Corporate Donation	
<b>Special Events</b>	
D. Special Events	
Envelope Total <small>(Add totals from A, B, C, D)</small>	
Total of only Cash and Checks that are enclosed in this envelope: \$ _____	

Final Campaign Envelope Report

Partial Campaign Envelope Report

Date: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

CEO Name: \_\_\_\_\_

Employee Campaign Coordinator (ECC): \_\_\_\_\_

ECC Phone: \_\_\_\_\_

ECC Email: \_\_\_\_\_

# of Employees: \_\_\_\_\_

# of Donors: \_\_\_\_\_

# of Leadership Givers: \_\_\_\_\_

Prepared by: \_\_\_\_\_

Turned in by: \_\_\_\_\_

Leadership Giving  
(Individuals or combined spouse contributions of \$1,000 or more)  
Please enclose a list of names of all the Leadership Givers that are in this envelope

**Thank You!**

## STEP 7:

# SAY "THANK YOU"

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

GIVING TO UNITED WAY MAKES PEOPLE FEEL GOOD ABOUT CARING.

**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 Campaign Finale with your team

# 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 health and 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

##### AGING WORKFORCE

Equip workers with the resources to be financially stable for retirement

##### 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?

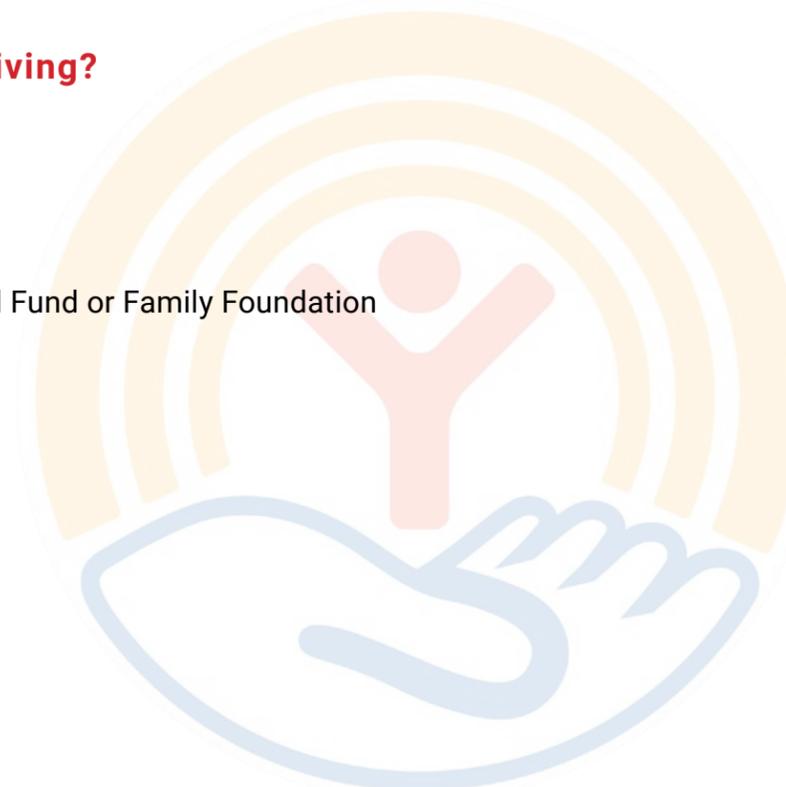
**Dial 2-1-1** for help at any time of day or night, seven days a week. **2-1-1** is a 24-hour information and referral help line that provides information and assistance to programs and services ranging from child and adolescent mental health counseling to emergency financial assistance.

### 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, 2018, is 17.5%.

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

- Cash, Check or Credit
- Online
- 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



**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.

**THANK YOU!**  
**CHANGE**  
**WON'T HAPPEN**  
**WITHOUT YOU**



**UNITED WAY OF THE BIG BEND**  
307 E. Seventh Avenue | Tallahassee, FL 32303  
Ph 850.414.0844 | Fx 850.414.0852 | [www.uwbb.org](http://www.uwbb.org)