



LEARN *Well*



EARN *Well*



LIVE *Well*



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Our Thanks



As the new President and CEO of United Way of the Virginia Peninsula, please accept my personal thanks for your willingness to lead your organization's 2016 United Way Campaign. Your personal commitment to this effort is important to all of us and, more important, to our entire community.

As an ambassador for United Way, you are one of our most important volunteers. You play a key role in helping to educate coworkers about the impact United Way is making on issues facing the Virginia Peninsula. You also can help ensure that every member of your group is provided with the opportunity to “give back” to the community should they wish to do so.

This toolkit provides information needed to build upon last year's success, whether you are a first-time coordinator or a veteran. Of course our United Way staff is always available to answer questions and help make your job easier.

On behalf of the many people who will be helped by your service to our campaign—thank you.

Sincerely,

Steve

Steven S. Kast
President & CEO



United Way's Work

United Way works to build a stronger community by focusing on three basic components necessary to help residents have healthy and fulfilling lives:


- Opportunities to **LEARN WELL**, through programs that ensure school success and help children and youth achieve their potential.
- Helping residents to **EARN WELL**, through programs that promote self-sufficiency and allow families to become more financially stable and independent.
- Offering the ability to **LIVE WELL**, through improved community health and wellness care that provides for the physical, mental, and emotional well-being of our citizens.

United Way works year-round in collaboration with other stakeholders in our community to **IDENTIFY NEEDS**. These include municipalities, faith-based groups, other funders, and health and human service organizations.

United Way works to **FIND ANSWERS** to critical issues and ensure the adequate funding of the most effective human service programs on the Peninsula. The process for choosing which programs are funded involves volunteers from all sectors of the community. These volunteers, along with our staff, thoroughly research agency program goals and make visits to see programs in action. Then together they make funding recommendations. At United Way, we believe decisions that affect the community should be made by people living in the community.

United Way **FUNDS SOLUTIONS—NOT AGENCIES**. Other funding organizations allow agencies to spend donated money on whatever they may need, including operating costs or building expenses. United Way funds specific programs and holds agencies accountable for the donor monies they receive.

While many programs claim they are changing lives, simply reporting the number of people served isn't enough. Programs receiving United Way funds are required to have a clear set of objectives and report **MEASURABLE RESULTS** on a regularly scheduled basis. This extra level of accountability ensures that donated funds are being used efficiently, effectively, and that they are making a real impact on critical issues in our community.



Job Description

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You were chosen from among your co-workers to assume responsibility for leading the United Way Campaign in your company. You now play a critical role in bringing together the necessary resources to conduct an effort that will ultimately have a significant impact on the lives of people in need in our community. It's an important job—and we're here to help. Your primary responsibilities include:

- Organizing and managing an educational campaign that teaches employees about community needs and services.
- Selecting and training a Campaign Committee.
- Assisting in making the campaign fun by creating enthusiasm and involving the entire organization.
- Developing objectives, themes and strategies for success along with your committee.
- Developing a partnership with your most valuable resource—your United Way representative.
- Ensuring that everyone in the organization has the opportunity to give and that everyone is asked to participate.
- Reporting campaign progress and final results to the employees in your organization.
- Reporting results to United Way by November 1st.
- Thanking your Campaign Committee and donors in your company.
- Evaluating your campaign's effectiveness.
- Encouraging appointment of a coordinator for next year.



Campaign Staff

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Campaign Step by Step

- 1. Train with a United Way representative.**

Get to know your United Way staff representative as you go over the campaign materials and timeline. Also, talk with last year's coordinator to review what ideas worked within your company. Learn about your company's giving history.

2. Enlist the help of your CEO.

The support of your CEO is key to a successful campaign. Here are the best ways your CEO can help:

- Establish payroll deduction at your company, if not already in place. It's the most convenient way to give.
- Have the CEO send a letter of United Way support to employees telling them why it is the most effective way to give back to the community.
- Have the CEO personally solicit top management in the company through an effective leadership campaign.
- Allow United Way representatives to hold brief meetings with employees to talk about community issues and have your CEO attend those meetings.
- Encourage employees to make visits to local agencies to tour facilities and learn more about how United Way contributions are helping the community.

3. **Have the CEO determine a generous corporate gift**, perhaps matching employees' total contributions.

If a corporate gift must be formally requested by United Way, please inform our staff representative of the proper way to make the request (i.e. by personal letter, online form, etc.)

4. Choose your campaign team.

- Select a representative from each department to be part of a Campaign Committee to assist in planning.
- Choose a coordinator for next year and have that person “shadow” the current coordinator.

5. Understand United Way's funding process.

- Review the Community Investment Summary and become familiar with how United Way spends the funds raised during workplace campaigns. If you have questions, ask your United Way representative.

6. Set your goal.

- Review last year's performance and consider increasing your goal for this year. Identify changes, such as reorganization or number of employees.
- Look at how many people gave last year and divide that by the total number of employees to determine percent participation in the campaign.
- Calculate your average gift by dividing the total employee gift by the total number of givers.

$$\frac{\text{\# of Employees}}{\text{\% Participation}} \times \$ \frac{\text{Average Gift}}{\text{Goal}} = \$$$

7. Develop a schedule.

- Design a campaign timeline that best suits your employees. Your United Way representative can help you develop your campaign schedule and deadlines.
- You will need a campaign start date; number of employees and departments; number of pledge forms and report envelopes; and the number of goal thermometers and posters.



Campaign Step by Step *(continued)*

8. Plan your approach.

- Group solicitation is fast and efficient for larger companies. Employees hear about community services from a United Way rep; pledge forms are distributed and employees return completed forms as they leave.
- One-to-one solicitation (one employee asking another) works well for small organizations.
- If you have an online campaign, be sure to distribute instructions on how it works so everyone has the opportunity to contribute. Your employees will appreciate you putting a “human face” on a digitally-run campaign.

9. Offer incentives.

- Encourage participation by offering prizes to departments that reach or exceed their goals. Prizes can include prime parking spaces, lunch with the boss, paid days off, gift certificates, or donations of goods or services.
- Please note that you are strictly prohibited from using United Way’s name or logo when asking for a donation. Businesses will get the false impression that donations to your company are tax-deductible and that is not the case.

10. Have a fun campaign and build awareness.

- Schedule a short, intensive, FUN campaign! Brief campaigns keep enthusiasm high and offer quick results.
- Help build awareness of your campaign through newsletters, e-mails, posters and bulletin boards.
- Let employees know how gifts are being used to help people in need. Highlight campaign dates and goals, feature United Way agency testimonials, and share your success.

11. Turn in results by November 1st.

- Report Envelopes are part of your campaign supplies and help you report United Way results accurately.
- If you need assistance in completing your Report Envelope, please do not hesitate to contact United Way.
- Be sure to submit copies of the pledge forms and final reports to your payroll department, as well.

12. Say “thank you.”

- Thank your campaign team and your contributors. Send a “thank you” letter from the CEO to your committee members and to all donors. Post a special “thank you” message in your company newsletter.

13. Conduct a post-campaign evaluation.

- After you’ve completed your company campaign, evaluate its effectiveness. A critique will help determine strengths and challenges.
- Ask your Campaign Committee to discuss recommendations for improvement.
- Keep notes in a folder to pass along to next year’s Campaign Team.



Group Presentations

The Number One reason most people don't give to United Way is because they have not been asked. Make it a priority to educate employees and provide everyone with the opportunity to "give back" to the community.

The brief presentation has proven to be the most efficient and effective way to reach employees in your organization—and it can be accomplished in LESS than 15 minutes! Here is a sample agenda with responsibilities and timeframes:

AGENDA ITEM	PRESENTED BY	ESTIMATED TIME
Greeting/Opening remarks (Announce company goal, incentives, events, etc.)	Coordinator	1 minute
CEO Endorsement	Company CEO/Manager	1 minute
United Way Overview	United Way Rep	10 minutes
Participation request	Coordinator	2 minutes
Collect pledges/Thank you	Coordinator	1 minute

TOTAL TIME: 15 minutes!



Social Media

United Way's website and our presence on both Facebook and Twitter are great resources for information you can use to enhance your workplace campaign.

ON OUR UNITED WAY WEBSITE YOU'LL FIND—

- Downloadable campaign materials, including this toolkit, posters, thermometers, and flyers.
- Links to partner agency websites.
- A comprehensive listing of SmartCard participating businesses, including locations and offers.
- A link to our volunteer website: **www.volunteerpeninsula.org**, where you can access opportunities to volunteer in the community, donate materials, or participate in volunteer events.

ON FACEBOOK AND TWITTER YOU CAN—

- Become a fan and follow us as we share the latest information about how United Way is at work in the community.
- Share your campaign successes with others in the community.



The SmartCard

The popular SmartCard “thank you” from United Way is distributed by coordinators at the conclusion of the campaign to those who pledge \$150 or more to United Way. The SmartCard includes deals and discounts at area businesses and eateries. Best of all, the SmartCard is good for 15 months, from October 15, 2016 through December 31, 2017. SmartCard information can be found on our Web site: **www.uwvp.org**.

IMPORTANT NOTE: To avoid fraudulent activity, if a SmartCard becomes lost or damaged, donors must contact the campaign coordinator for pledge verification and a replacement card.



First Call/211

United Way's First Call Information and Referral Service provides area residents with referrals to health and human service programs throughout the Peninsula and Middle Peninsula. Your United Way representative can provide you with flyers and posters for your workplace to help inform employees of this important service. First Call operators answer calls from 8am-6pm, Monday through Friday, at 757.594.4636. When First Call is not operational, residents may call Virginia 211, another referral service available to the public operating seven days a week, 24-hours a day.



Sample Letters & Emails

SAMPLE CEO SUPPORT LETTER

We are fortunate that in ever-changing times like these, there are some things of which we can always be certain—the love of family; the strength of friendships; and the critical community services provided through your contributions to United Way.

At one time or another we have probably all depended on United Way. Last year our employees helped raise more than \$_____ for our community, and this year, your generosity and spirit can help United Way do even more.

Please join me in keeping the (company name) tradition of caring for our community. I encourage you to take a minute of your time to support the things that matter most. Please join me in giving to United Way.

Sincerely, CEO Name

SAMPLE E-MAILS

Mark your calendars for a special (Name of Kick-off Event) to celebrate the kick-off of the United Way Campaign. United Way provides the opportunity for all of us to give back to our community and to the things that matter most to us. Don't miss out! Join us on (Repeat the date, place & time).

This is a busy time for all of us, but please remember the United Way Campaign is going on right now and will conclude on (Date). Please complete your pledge form and give it to your department coordinator as soon as possible. United Way makes it easy to give to the things that matter most.

We're almost there! The United Way Campaign is almost completed and so far our employees have raised (Dollar Amount)! This is great news, but I know we can raise even more with your help. Please take a minute to complete your pledge form and give it to your department coordinator. Remember that United Way makes it easy to give to the things that matter most to you.

SAMPLE THANK YOU CORRESPONDENCE & E-MAIL

You've done it again! I am proud to announce that in a magnificent display of community spirit, our employees have raised a total of (dollar amount) for the United Way Campaign. Thanks to all of you, hundreds of people on the Virginia Peninsula will receive help, hope, and the opportunity for a better life. Thank you for your kindness, your generosity, and your caring commitment to the things that matter most in our community.

—Sincerely, CEO Name

As your United Way Campaign Coordinator, I sincerely thank everyone who worked hard to make this year's effort so successful. Your generosity was truly inspirational! Thanks for making my job as coordinator so gratifying. It is great to be working with a group of people who care so much for our community. Thank you.

—Sincerely, Coordinator Name

Congratulations! Thanks to your generous support, we were able to raise a total of (Dollar Amount) for this year's United Way Campaign! Your kindness is overwhelming and I thank everyone who took the time to make a pledge. Your dollars really do make a difference in the lives of others and, on their behalf, I sincerely thank you.

—Sincerely, Coordinator Name



Funded Service Providers

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Alternatives, Inc.
American Red Cross of Coastal Virginia
Bacon Street Youth and Family Services
Big Brothers Big Sisters of the Greater Virginia Peninsula
Boy Scouts of America, Colonial Virginia Council
Boys & Girls Clubs of the Virginia Peninsula
C. Waldo Scott Center for H.O.P.E.
Catholic Charities of Eastern Virginia
Center for Child & Family Services
Child Development Resources
Downtown Hampton Child Development Center
Edmarc Hospice for Children
Foodbank, Virginia Peninsula
Girl Scout Council of Colonial Coast
Gloucester Housing Partnership
Gloucester-Mathews Care Clinic
Habitat for Humanity
H.E.L.P., Inc.
Lackey Free Clinic
LINK of Hampton Roads
NATASHA House
Peninsula Agency on Aging
Peninsula READS
Salvation Army, Peninsula Command
The Samaritan Group
Transitions Family Violence Services
Urban League of Hampton Roads
VersAbility Resources
YMCA, Peninsula Metropolitan



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