

EMPLOYEE CAMPAIGN COORDINATOR TRAINING GUIDE 2008



United Way
of St. Lucie County



GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED 

WELCOME

Thank you for serving as an Employee Campaign Coordinator (ECC)!

We appreciate you helping us continue the tradition of caring for our community.

United Way of St. Lucie County is proud to have raised over \$23 million since 1962. Please help us make this 2008 community wide campaign our best year ever!

Inside this guide you will find resources and tips to help you plan an employee campaign that will be fun, effective and meaningful to your co-workers.

Feel free to personalize the ideas in this guide to meet your organization's interests.

If you have any questions or need some help, please don't hesitate to call our office at 772-464-5300. A United Way Loaned Executive or staff member will be happy to assist you!

Together, united, we can inspire hope and create opportunities for a better tomorrow.

That's what it means to

LIVE UNITED™

BEST PRACTICES

1. Learn

- Learn the facts about your United Way
- Meet with your United Way representative

2. Plan

- Involve your CEO
- Review last year's campaign results and set current goal
- Recruit a campaign team
- Develop a campaign theme
- Establish a timeline/schedule
- Identify incentives
- Schedule tours and agency speakers
- Schedule group meetings, promotions, and publicity
- Plan special events

3. Educate

- Promote your campaign early and often
- Conduct a management/Leadership campaign meeting
- Conduct group employee meetings and/or One-on-One Asks

4. Follow-Up...Follow-Up...Follow-Up!

- Pledge Card Management
- Report back to United Way
- Conduct thank you campaign and report final results to employees

LEARN

2008 Community Campaign

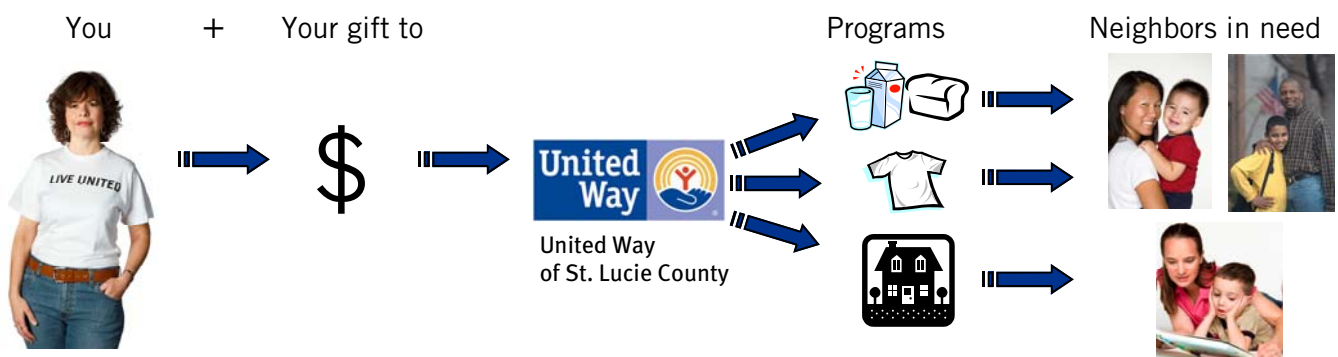
United Way's mission is to increase the organized capacity of people to care for one another. There are two distinct resources that we bring to our community— dollars and leadership.

The dollars we raise during our annual community campaign are the heart and soul of our organization, making a difference at 48 programs in the county.

The combined leadership of our volunteers and staff have helped us partner with government, business, faith groups, other nonprofits, and ordinary citizens to tackle the issues of our community.

How Does United Way Work?

1. You contribute to United Way
2. United Way combines your gift with the gifts of your friends and neighbors to distribute to the community.
3. Trained volunteers study local programs in the community to determine where the money is needed and can do the most good.
4. United Way—funded programs assist our neighbors in need.
5. Positive changes begin to occur in the lives of those in need, and our community becomes stronger.



LEARN

LIVE UNITED™



"How wonderful it is that nobody needs to wait a single moment before starting to improve the world." —Anne Frank

LIVE UNITED is the theme of this year's 2008-2009 United Way campaign.

United Way is working hard to advance the common good by focusing on education, income and health. These are the building blocks for a good life: a quality education that leads to a stable job, enough income to support a family through retirement, and good health.

EDUCATION

Helping children and families achieve their potential through education

- » Improving access to quality, affordable child care and early learning opportunities
- » Equipping students with the school supplies necessary to be academically successful
- » Providing after-school and mentoring programs for at-risk youth

INCOME

Helping families become financially stable and independent

- » Supporting basic needs while increasing financial education
- » Helping hardworking people who struggle to make ends meet
- » Raising awareness of available health and human service programs

HEALTH

Improving people's health

- » Increasing access to critical health care services
- » Reducing substance abuse, child abuse and domestic violence
- » Increasing health education and preventive care

United Way's goal is to create long-lasting changes by addressing the underlying causes of community problems. Living united means being a part of the change.

It takes everyone in the community working together to create a brighter future. So we bring together people from all across the community—government, business, faith groups, nonprofits, the labor movement, ordinary citizens—to tackle the issues.

Because we all win when a child succeeds in school, when a family becomes financially stable, and when people have good health.

LEARN

GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED

There are three ways that you can **LIVE UNITED** in your community:

GIVE: The workplace campaign is the easiest and most powerful way to invest in your community.

ADVOCATE: You can make change happen with your voice. Get informed. Tell your friends. Write a letter to the editor. United Way needs people who are passionate about creating a brighter future in our community to make some noise.

VOLUNTEER: United Way works with volunteers and local nonprofits to develop the best opportunities for youth, busy working adults, and seniors.

Live United Elevator Speech

As the ECC, you may be asked to say a few words about United Way during your campaign kickoff or group meetings. The elevator speech brings together all of the important ideas about United Way's impact in the community.

United Way is working to advance the common good by focusing on education, income and health. These are the building blocks for a good life— a quality education that leads to a stable job, enough income to support a family through retirement, and good health.

Our goal is to create long-lasting changes that prevent problems from happening in the first place.

This is why we support programs that provide early learning opportunities, improve financial education, and increase health education and preventive care.

We invite you to be part of the change.

Together, United, we can inspire hope and create opportunities for a better tomorrow.

That's what it means to **LIVE UNITED**.

LEARN

How Do You LIVE UNITED?

Sample Live United Stories

“My family and I have been contributing to United Way for some time, but we never imagined there would be a time where we ourselves needed help. The services they help provide in St. Lucie county have been so helpful to us through some very difficult times. That’s why my wife and I try to give back as much as we can every year during the annual campaign.”

- *Troy Church, St. Lucie County Sheriff's Office & Founder, Katy Foundation*

“I’ve been working on the United Way School Supplies for Students project for 4 years. When people ask me why, it gives me an opportunity to speak to them about the needs in our community; not just for school supplies, but the many other issues that United Way and other organizations are focusing on to help build a brighter future for our children.”

- *Dee Benjamin. Children's Home Society*

“I participated in the United Way Day of Caring for the first time this year. Since my father owned a flower shop and received a tremendous amount of help from Hospice several years ago before he passed away, my sister, niece and I spent the morning making flower arrangements for patients at their Fort Pierce facility. It was the perfect project for us to give back to the community and come together in honor of our dad.”

- *Laura Maloney, St. Lucie County Schools*

PLAN

1. Involve your CEO

- Ask him/her to speak at employee meetings in support of your campaign.
- Send a letter or email of support.
- Ask for a campaign budget for food at meetings, incentives and thank you events.
- Ask permission to take employees on agency tours and/or have an agency speaker come to your company.
- Request a separate meeting for top management for leadership giving (It's likely a United Way representative will have already met with your CEO about these points).

2. Review last year's campaign results and set a goal

- Your United Way representative can help you decide what will work best for you and your organization to help motivate and inspire your co-workers to participate.

3. Recruit a campaign team

- Ask for help and make it fun!

4. Develop a campaign theme

- Choose a fun campaign theme! Mexican fiestas, Hawaiian luaus, sports teams, NASCAR, etc. are all great ways to make your campaign more enjoyable.

5. Establish a timeline

- Short, quick campaigns work best. We suggest no more than two weeks for the active portion of your efforts

6. Identify incentives

Incentives are a great way to increase employee participation! Give everyone who turns in a pledge card fun, inexpensive prizes such as:

- Entry into a drawing for a paid day off
- Lunch with the boss
- Special parking space or an extra lunch hour
- Mini candy bars with a ticket to enter a grand prize drawing
- Have the boss "work" for the employees
- Gas cards, restaurant gift certificates, or movie tickets`

PLAN

6. Call your United Way Rep to schedule tours and agency speakers

- This is one of the most effective “BEST Practices” you can do to make your campaign a success!! Visiting an agency to see the need firsthand or the personal touch of an agency speaker is very powerful!

7. Schedule your group employee meetings, promotions and publicity

- Pick a time when the most employees will be there or have several meetings to reach everyone.
- Add 30 minutes to an existing staff meeting

8. Plan Special Events

- Bake sales, car washes, raffles, candy grams, boss dunking booths, and rummage sales are all great ways to get the whole organization involved in your campaign. See our Campaign Themes and Special Event Ideas handout for more fun ways to get people involved.

EDUCATE

Now that you have decided on what to do, make sure everyone knows about it!

- Before your campaign begins, start putting up fliers and sending out promotional emails. Let your co-workers know *When, Where* and *Why* you are having the meeting.
- Have sign-up sheets available in high-traffic areas for those employees who want to go on agency tours.
- If you are going to have food at your meetings, make sure you let everyone know! If you feed them, they will come!
- **Food, fun and free are the three most successful keys!**

Run a Leadership management campaign first

By asking your top management to participate first, you will be setting the tone for the entire campaign. It means something to employees when they know that the boss supports United Way– not only with time but with money as well.

Group Meetings and/or One-on One Ask

Everyone has their own special style of speaking to a group. The most important thing to remember is to be yourself. Take a personal track. If you've been involved with United Way for any length of time, tell your co-workers about your experience. If you know someone on your staff who has been helped and is willing to speak, enlist their support.

Example:

“I've been a United way volunteer/Campaign Coordinator for () years.” (Insert your personal experience)-
OR- “Joe Smith in the procurement department had a family member who was recently helped by a United Way program and would like to share his story with you.”

EDUCATE

Closing:

“I truly believe that our United Way makes a difference here in St. Lucie County, helping to change lives for the better. That’s why I’ve already completed my pledge card and ask that you please join in advancing the common good today.”

Sample Meeting Agenda

(Don’t forget the pens for signing the pledge forms!)

	Minutes
• ECC and/or CEO welcomes and endorses the campaign	1
• ECC explains how the pledge cards will be distributed and collected and then introduces UW rep.	2
• ECC shares a personal story or one of the following speaks: United Way rep., partner agency rep or client	8
• Show United Way video	5
• United Way rep and ECC extend invitation to give and ask for Employees’ support.	2
• ECC collects pledge cards and thanks employees.	2
Total	20

Keep in mind

Most people worry about asking for something and getting a resounding “no!.” Remember: your job as an ECC is **NOT** to make sure everyone gives. That is their personal choice. Your *number one responsibility* is to make sure everyone is provided a quality, consistent, non-coercive ask.

FOLLOW UP

You may have given an outstanding speech or spoken to every one of your co-workers, but unless you get people to turn in their pledge cards, there won't be any true impact on community needs. Programs need volunteers but they also need money to provide quality services.

Pledge Card Management: "Try to get all the cards returned"

Getting the pledge card back is the key to any successful campaign. All your efforts up until now have pointed to "the ask". Your co-workers are at their highest level of educational awareness regarding United Way during the meeting. That means they are the most likely to give/make their decision right then. So, make sure you ask your fellow employees to complete their cards and return them to you before the end of the meeting.

By collecting all cards (or as many as possible) at the end of the meeting, you reduce the amount of time you spend following up and asking your co-workers if they have had an opportunity to participate. For those that don't turn in their card at the end of the meeting try to get them to return it to you by the end of the day.

Tax Law Reminder

The IRS rules for charitable donations changed for cash, check, and payroll deduction contributions made on or after January 1, 2007. Donors must now provide documentation for ALL charitable donations they wish to deduct on their tax return, regardless of the amount of the donation. Specifically, the law requires taxpayers to maintain a cancelled check, bank record, or a receipt from the charity showing the name of the charity and the date and the amount of the contribution.

- Deductions for cash contributions must be substantiated by a receipt from the charity.
- Deductions for contributions made by check can be substantiated by keeping the cancelled check or obtaining the image of the cancelled check from the bank (many banks provide check images online or with the month end statement).
- Deductions for payroll contributions must be substantiated by a copy of the donor's pledge card (or tear-off that is provided) **AS WELL AS** a year-end payroll stub or W-2 from the donor's employer showing the amount of the payroll deduction contribution that was withheld from the donor's pay.

As always we encourage our donors to contact their tax professionals for all tax advice and **specific questions regarding these new charitable deduction rules.**

FOLLOW UP

Reporting back to United Way

If you need help, please call your UW rep at 772-464-5300.

1. Make sure you keep the top copy for your files and give the middle copy to the donor and the bottom copy to your United Way rep.
2. For each type of giver (cash, check, credit card, payroll deduction) add up the total number of givers and the total amount of their combined annual gifts. Enter that number on the front of your report envelope.
3. Don't forget to include the corporate gift information and the number of leadership givers.
4. When you have completed your envelope, call your United Way rep for pick up.
Please do not mail the envelope to United Way.

Conduct your thank you campaign

How you say thanks isn't as important as the act of saying it. Just be sure to have fun and acknowledge your co-workers' hard work and generosity.

- Post "Thank You" fliers in high traffic areas
- Throw a pizza party!
- Have a special lunch for your Leadership givers and campaign team.
- Send out "Thank You" emails, notes, cards, or letters.
- Give our United Way pins, stickers, or other promotional items.
- Put a piece of candy on each person's desk

Don't forget to report final results to employees!