

United Way of the Greater Seacoast Employee Campaign Manager Guide 2008



GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED 

GUIDE CONTENTS:

About United Way of the Greater Seacoast	1
Contributing to the Community Fund	2
Your Campaign: Step-by-Step	3-4
Group Solicitations	5
Using Incentives & Events	6
One-on-One Solicitations	7
Using Letters & Emails	8
Leadership Giving	9
Concerns & Objections	10
Frequently Asked Questions & Answers	11
Using the Forms	12-13

Visit www.uwgs.org to use the online campaign toolkit for sample letters, emails, posters, and other materials to make your campaign a success.

United Way of the Greater Seacoast Staff

Sue Donahue Suter
Executive Director
ssuter@uwgs.org

Cindy Boyd
Assistant Executive Director
cboyd@uwgs.org

Christine Penney
Senior Director, Resource Development
cpenney@uwgs.org

Anne Lynch
Director, Resource Development
alynch@uwgs.org

Anna Kraus
Director, Gift Planning
akraus@uwgs.org

Cheri Wilkins
Resource Development Associate
cwilkins@uwgs.org

Chris Blair
Finance Associate
cblair@uwgs.org

Liza Dube
Senior Director, Communications
ldube@uwgs.org

Dave Cohen
Senior Director, Community Building
dcohen@uwgs.org

Lauren Wool
Director, Community Building
lwool@uwgs.org

Robin Albert
Director, Volunteer Action Center
ralbert@uwgs.org

Helen Long
Assistant Director, Volunteer Action Center
hlong@uwgs.org

Joanne Alessi
Office Manager
jalessi@uwgs.org

Marge Desmond
IT Manager
mdesmond@uwgs.org

Brenda Schwechheimer
Executive Associate
brendas@uwgs.org

United Way of the Greater Seacoast
112 Corporate Drive, Unit 3
Portsmouth, NH 03801
603.436.5554

Advancing the Common Good

United Way of the Greater Seacoast is working to advance the common good by focusing on education, income and health. These are the building blocks for a good life—a head start on quality education that leads to success in future jobs, 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.

When you give to United Way, it's an investment in our community.



United Way works because it's:

Local

United Way of the Greater Seacoast serves a total of 47 communities in Strafford County, Rockingham County, and Kittery and Eliot, Maine.

Effective

By using targeted funding strategies, and community collaborations focused on getting results, United Way has an efficient, effective approach to solving community problems.

Accountable

Through the extensive use of community volunteers – including a locally governed Board of Directors – and a commitment to this community, United Way maintains an overhead rate of 17%, far below the 35% recommended by charitable monitoring organizations.

Proven

United Way of the Greater Seacoast generates millions of dollars into the community through targeted efforts getting people to work together and volunteer resources.

Together, we get results no one could accomplish alone. That's the United Way.

The Community Fund

While direct care agencies help those who are lining up at their doors, United Way of the Greater Seacoast is working to shorten the lines. We're taking a new, groundbreaking approach to supporting local non-profit agencies by getting people to work together, finding root causes, and creating lasting solutions to our community's greatest problems.

By giving to the United Way of the Greater Seacoast Community Fund, you support our work to begin not just treating, but eliminating the need in our top priority issue areas – education, income and health.

WHY EDUCATION, INCOME AND HEALTH?

The cost of childcare in NH rose by 88% in the past 5 years.

Over 80% of Seacoast residents pay more than they can afford on housing.

The number of people in NH without health insurance increased 19% in a single year.

WHAT'S UNITED WAY DOING ABOUT IT?

EDUCATION

Helping children and youth achieve their potential through education

- ⇒ Improving access to quality affordable child care and early learning opportunities



INCOME

Helping families become financially stable and independent

- ⇒ Paving the way towards more available affordable housing in the Greater Seacoast
- ⇒ Helping working families access the nearly \$5.2 million of unclaimed Earned Income Tax Credits on the Seacoast through volunteer tax return assistance

HEALTH

Improving people's health

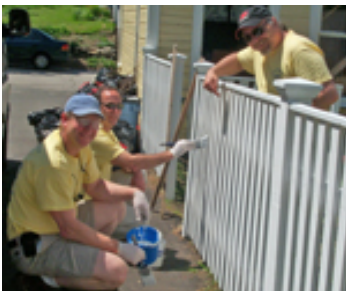
- ⇒ Providing access to critical healthcare and social services by providing access to transportation for seniors, people with disabilities and lower-income working families
- ⇒ Reducing substance use and abuse among young people
- ⇒ Providing specialized healthcare services to uninsured individuals and families.

Many times, community members fall into situations that do not allow them to take care of themselves or their families. Underscoring United Way of the Greater Seacoast's work in Education, Income and Health is our work to find the root causes of poverty and need in the Greater Seacoast in order to put all of our community members on the right track to developing the building blocks for a better life.

Your Campaign: A Step-by-Step Guide

STEP #1: GET STARTED

- ✓ Read UWGS Employee Campaign Manager Guide
- ✓ Learn the importance of United Way
- ✓ Review United Way materials
- ✓ Meet with your United Way representative



STEP #2 ENLIST SOME HELP

- ✓ Ask your CEO to appoint next year's Employee Campaign Manager (ECM) to work with you.
- ✓ Recruit a committee representing all of the departments in your organization.
- ✓ Your CEO's enthusiasm can be contagious. Ask him or her to write a personal letter of support to all employees (see examples on page 8).

STEP #3: ANALYZE CAMPAIGNS AND SET A GOAL

- ✓ Talk with last year's ECM to find out what worked and what didn't work during last year's campaign.
- ✓ Ask your United Way representative for campaign analysis and goal setting help.
- ✓ When looking at past results, keep in mind:
 - Number of contributors
 - Total amount raised
 - Participation rate
- ✓ Based on what you find, consider setting goals for:
 - Total dollars to raise
 - Percent of employee participation
 - Average gift

STEP #4: DECIDE ON SOLICITATION STYLE

- ✓ **Group Solicitation:** Employees are brought together to hear the United Way message and are then asked to fill out their pledge forms at the end of the presentation. Group solicitation allows for efficient use of time, and because employees hear a uniform message less follow-up is required.
- ✓ **Individual Solicitation:** This is a one-on-one ask to an employee for a gift. This style involves more employees but personalizes the campaign and offers you a greater opportunity to answer individual questions (see page 7).
- ✓ **Both:** Hold one group meeting or a series of group meetings and use the one-on-one solicitation as a means to follow-up with those who couldn't attend a group session.
- ✓ Emphasize leadership giving (for personal gifts of \$1000 or more) and other recognition levels (see page 9).
- ✓ Hold a separate group meeting for all management and professional employees to be asked prior to the employee campaign to set the pace. If this is your first campaign, ask your United Way staff person for some extra assistance with this group meeting.

STEP #5: CREATE A BUZZ BEFORE YOUR CAMPAIGN STARTS

- ✓ Visit United Way of the Greater Seacoast's website at www.uwgs.org for more campaign ideas and downloadable logos, ads and flyers.
- ✓ Share information through employee newsletters, e-mail and other in-house communication tools.
- ✓ Build awareness for the upcoming campaign with United Way posters and brochures.
- ✓ Increase employee involvement by creating friendly competition between departments and award prizes ordered from the United Way catalogue or company incentives.

STEP #6: EDUCATE YOUR CO-WORKERS ABOUT UNITED WAY'S WORK

- ✓ Use campaign video and speakers to show how United Way dollars are at work.
- ✓ Visit www.uwgs.org and download information to share with your fellow employees.
- ✓ Schedule your campaign and book your speakers early!



STEP #7: CONDUCT THE CAMPAIGN

- ✓ Set a timetable for a short, intensive campaign to keep the momentum and enthusiasm high. **A two-week campaign has proven to be the most effective.**
- ✓ Conduct an employee kickoff celebration. Use the United Way campaign video in your meeting(s) to make employees aware of what United Way is doing in our community
- ✓ Make a gift yourself. It is easier to ask others to give when you are giving.
- ✓ Use personalized pledge forms when possible to make sure everyone has an opportunity to contribute.
- ✓ Make sure every employee is asked to consider a gift. Don't forget employees who work off-site, travel extensively, or are on alternate shifts.
- ✓ Get help from payroll, data processing and department heads.

STEP #8: REPORT RESULTS

- ✓ Report results to United Way as soon as possible. For large employee groups weekly partial reports are recommended, with a final report following the completion of your campaign.
- ✓ Make sure all pledge forms are returned and accounted for.
- ✓ Forward copies of all payroll deduction forms to your company's payroll department.
- ✓ Summarize all campaign information on the Report Envelope. Enclose cash, checks and copies of all pledge forms.

Making the Most of Solicitations

1. Meet with your United Way representative to review the details for your group meetings, including the agenda, speakers - both from inside and outside your organization - and the logistics. Be sure to include your CEO or other senior executive on the agenda.

Sample 15-Minute Meeting Agenda

- CEO welcomes employees and endorses campaign. **2 minutes**
- United Way speaker makes presentation and shows United Way video. **8 minutes**
- Distribute pledge forms and answer any questions. UWGS representative asks for the pledge. Thank employees. **5 minutes**

2. Choose an appropriate meeting time. Publicize group meetings well in advance, and send reminders to employees. Remember to use your organization's established communication channels.
3. Use the United Way Talking Points (available from your United Way representative) to help with basic information.
4. Use incentives to encourage employees to get involved. Food and door prizes are great for getting people to come to meetings and time off is a great incentive for gift giving.

Increase Participation...

...Use incentives for first time donors.

...Everyone who contributes via payroll deduction is entered in a drawing. When the campaign is complete, have the drawing for incentives.

...If you make the company goal, throw a party.

Increase the Average Gift...

...Use incentives for donors increasing their annual gift.

...Give the employees extra time off for increasing their gift by 10%.

...Hold a leadership giving campaign.

...Establish a company leadership level and recognize accordingly.

...Ask employees to give \$1 more a week.

Incentives & Events

Incentives

- ✓ Discuss incentive options with CEO – including time off.
- ✓ Purchase items from the United Way of America catalog even if you have a small budget. United Way of America will ship directly to you.
- ✓ Ask other employees to donate items or services to give away.

Incentives that Work

Time Off

Extra 1/2-Hour for Lunch for a Week

“Leave Work Early” Passes

“Sleep-in” Passes

Bonus Day Off

Casual Day

Company T-Shirts

Reserved/Covered Parking

Tickets to Games/Movies

Grocery Certificates

Dinner For Two

Hotel Getaways

Gift Certificates

Trophy For Department with Highest Participation



Events

Departmental Penny Wars

Casual Day

Softball/Volleyball Tournament

Golf Tournament

Bake Sale

Silent Auction

Management Services Auction

Sell popcorn and drinks

Company Picnic/Employee Cookout

Voice Mail/E-mail Quiz



One-On-One Solicitations

Step 1: Make Your Introduction and Describe United Way

- Each United Way is governed by a local Board of Directors and encourages the involvement and input of donors working to build a better community for all of us.
- United Way is a community leader in identifying and solving local problems, working with a variety of partners from nonprofits to mayors to best use limited resources.
- United Way makes investments in groups working together to find long-lasting solutions in the areas of education, income and health.
- United Way provides grants to local non-profit agencies that are able to report measurable results.
- United Way provides opportunities for all of us to Live United and give to, advocate or volunteer for causes that matter to us most.

Step 2: Give Examples of How Your Gift Will Help

Try to personalize stories and examples to people you know will be helped. Some examples are available on United Way's website. Also use the campaign video and speakers as resources.

Step 3: Share The Pledge Form

Use the pledge form and brochure to explain how giving works.

Step 4: Answer Questions

- Answering questions about United Way gives you the opportunity to tell your fellow employees more about the work of United Way. See questions and answers on pages 10-11.
- If you are asked a question that you cannot answer, please call United Way at 436.5554 or send an email. We will get the answer to you quickly so you can follow up as soon as possible with the person.



Step 5: Ask For the Gift

You've answered the person's questions. Now you're ready to ask for the pledge. Again, encourage each person to give a payroll deduction gift and to give as generously as possible. If the individual doesn't fill out pledge form right away, have a clear deadline (i.e. 2 days) for turning in the form.

Step 6: Say Thank You

Thank the person for his or her time and gift. Assure the individual that the contributions will be used to help people in our community.

Sample Letters and E-mails

Downloadable letters and e-mails available on the United Way website www.uwgs.org.

Where to Find Letters on the Website

www.uwgs.org - Campaign Toolkit - Sample Letters & Emails

When to use a letter?

As a warm-up to the campaign

Send to employees a week before you begin meetings.

Include as a payroll stuffer a week before you begin your meetings.

Letters From The Top

Letters endorsing the campaign should be personalized as much as possible. This sends a clear message that the campaign, as well as the individual employee, is important. And last, but not least, don't forget to thank employees. Their generosity and caring deserves to be recognized.

EXAMPLE:

Dear Fellow Employees:

This fall, as you fill out your pledge form for United Way, I'd like to ask you to recognize that it's more than making a contribution. By giving back you LIVE UNITED. Imagine if everyone in our community did what you are doing, and chose to give to, advocate or volunteer for a cause that matters to us all. Think of the impact we'd have on our community.

United Way of the Greater Seacoast is working, not just to help people with needs, but to eliminate those needs in our community by finding the root causes and then creating long-lasting solutions to benefit us all.

We're lucky to live in such a strong community, and working together with the United Way, we can make it even better for all of us who live and work here. Because united we stand. United we elevate. United we can change what we see in our world.

When you give to the United Way, it's an investment in our community.

Great Bay Leadership Society

Founded in 1992, this society was created to recognize individuals who have given in excess of \$1,000 to the United Way of the Greater Seacoast. Membership in the society enables you to demonstrate your commitment to our region, while simultaneously enabling United Way and our partner organizations to continue addressing our communities' most critical needs.

In 2007, over 340 families and individuals were members of the Great Bay Leadership Society.



Leadership Society Giving Levels:

<i>Tocqueville</i>	\$10,000 & above
<i>Coheco</i>	\$5,000-\$9,999
<i>Squamscott</i>	\$2,500-\$4,999
<i>Bellamy</i>	\$1,000-\$2,499

2008 Challenge Grant

Encouraging others to give generously – that's how Seacoast community members Barbara and Cyrus Sweet LIVE UNITED.

Once again the Sweets are challenging you to step up your giving this year.

- For every new gift to United Way of the Greater Seacoast totaling \$250 or more, the Sweets will match it dollar for dollar.
- If you already give over \$250, the Sweets will match whatever you increase your gift by this year dollar for dollar.

There couldn't be an easier way to make the most of your investment in our community.

How to conduct a leadership giving campaign

- ✓ Ask your CEO to serve as the leadership-giving chair. He or she should participate at this level of giving.
- ✓ Work with payroll department to determine who to target for your leadership giving campaign by salary range, management level or donors who may already be close to leadership giving level.
- ✓ Ask your CEO to host event to kickoff the leadership-giving campaign before you launch the regular employee campaign.
- ✓ Send personal invitation from your CEO to the potential leadership givers. Create an agenda that follows the sample general meeting agenda on page 5.
- ✓ Follow-up with those who were unable to attend meeting.
- ✓ Report the results of the leadership giving campaign to all employees.
- ✓ Have CEO host a thank you/recognition event.

Concerns and Objections

You may, on occasion, encounter people who object to contributing to United Way. Keep in mind that objections are a natural part of the campaign and offer you an opportunity to present more information.

Here are some insights into the psychology of objections and suggestions for handling them:

Objections are not personal.

Remember, they are not directed at you.

Objections are often based on incorrect information.

Try to identify the real issue.

Show sympathy.

Listen carefully, and show your concern. This does not mean you agree, but that you care about the concern.

Don't argue.

Instead, offer information about the many ways United Way helps people, or offer to discuss the issue further after the group meeting.

Encourage the objector to talk.

Allow the person voicing the objection the opportunity to expand on it at length. An insecure, illogical or poorly thought-out objection will fail on its own.

Relax and be yourself.

You have the ideas to present, so be straightforward in your presentation. Asking for someone's participation or gift is not a "win/lose" situation.

Don't be afraid to say you don't know.

Let those with questions know you'll get back to them with the answer. Tell them they can call United Way at 436.5554 or visit our website at www.uwgs.org.

Remember to educate – not coerce.

The most responsive donors are those who have the opportunity to become informed and involved. Experience clearly shows that coercion creates animosity, hinders communication and understanding, and can lead to decreased support.

Questions and Answers



Who benefits from the work of United Way?

United Way of the Greater Seacoast is working towards long-term solutions to our community's most pressing needs to benefit *all of us*.

We recognize that when there is a single person in our community with a need, all of us feel the consequences - whether that's paying higher insurance premiums to cover the uninsured, arranging rides for aging parents who can no longer drive, or suffering higher crime rates related to substance abuse. There are also times when we as individuals unexpectedly find ourselves with a need and for those times we hope that a security net is in place.

By focusing on the underlying causes for problems UWGS is laying the foundation for a future community where people working side-by-side create stability, wellbeing, and opportunity for all of us.

Who runs United Way of the Greater Seacoast?

Unlike some non-profit organizations that have a national headquarters and local chapter affiliates, United Way has a national trade association with nearly 1,400 independent, self-governing local organizations. Here in the Greater Seacoast, your United Way is run by a professional staff of 16, overseen by a volunteer Board of Directors, and aided by hundreds of additional volunteers.

What's United Way of the Greater Seacoast's overhead rate?

According to the Better Business Bureau/Wise Giving Alliance standards, a non-profit organization's total fund raising and administration should be no more than 35% of total revenue. United Way of the Greater Seacoast's fundraising and administration costs, based on a 3-year audited average, are 17%.

Why should I consider giving to United Way Community Fund rather than to a single non-profit agency?

Often people need the help of more than one agency for housing, healthcare, job training, childcare, substance abuse treatment, transportation, etc. Donating to United Way takes into consideration the interdependent needs and full range of services required to make a meaningful and lasting impact in people's lives. While other non-profit agencies support those lining up at their doors, United Way works to shorten the lines.

Can I direct my gift to a specific issue area within the Community Fund?

Yes. You can choose to target your investment to support the work of a regional coalition working toward long-term solutions in either access to healthcare, substance abuse prevention, housing, or transportation.

Can I direct my gift to a specific agency or a United Way in a different community?

Yes. While United Way's primary focus is the Community Fund, donors may direct all or a portion of their contribution to any 501(c)(3) health and human service organization, (minimum gift of \$52.00) or another United Way. Contributions to specific agencies are separate from program allocations. Directed giving does reduce the total funds that would otherwise be available to support all programs through the Community Fund.

There is only 1 copy of the form. ECM's must make 1 copy for the payroll department and one for the donor for tax purposes.

REACH OUT A HAND TO ONE AND INFLUENCE THOUSANDS LIVE UNITED™



United Way Pledge Form

MR/MRS/MS/DR. FIRST NAME MI LAST NAME

HOME ADDRESS (For credit card charges, address listed must be your billing address.) CITY

STATE ZIP HOME PHONE DAYTIME PHONE

Register me for the United Way Loyal Contributors Program I have been contributing to United Way for ____ years.

I'd like to hear from United Way about how to leave a gift in my will.

Payroll Deduction: Include the amount per pay period and # of pay periods your company has.

Is your contribution making a difference? Please provide your home email address so we can show you how your contribution is making a difference. We provide opportunities to give, advocate and volunteer all year long.

EMAIL ADDRESS

PLEASE SELECT HOW YOU WOULD LIKE TO MAKE YOUR GIFT.

EASY PAYROLL DEDUCTION
My total annual gift
AMOUNT \$ _____

A. I want to contribute the following amount each pay period:
 \$100 \$50 \$40 \$25
 \$10 \$5 Other \$ _____

B. Weekly (52) Monthly (12)
 Every other week (26) Twice monthly (24)
 Other _____

DIRECT GIFT
AMOUNT \$ _____
Direct gift to be paid by:
 Cash
 Personal Check (Made payable to United Way of the Greater Seacoast)
 Securities to be conveyed on (MMDDYY): _____
 (Please call United Way at 603.436.5554 for details.)

MY GIFT OF \$1,000 OR MORE
qualifies me for membership in the Great Bay Leadership Society. My name will be listed as it appears above.
AMOUNT \$ _____
 Please list my/our name(s) as follows: _____

\$1,000 or more enters the donor into the Great Bay Leadership Society.

To learn more about giving a stock gift, call 603.436.5554

Bill Me: Billing can be done with paper invoices or automatically on a credit card. Complete the frequency of billing, when to begin and, if appropriate, fill out the credit card information.

BILL ME
 Quarterly Monthly Semi-annually

CREDIT CARD (mark one) Visa MC AmEx
 Card # _____
 Exp. Date _____
 Name on Card: _____
 Bill Me: Monthly Quarterly Other: _____

To donate to a specific focus area or any 501(c)3 agency, complete the Optional box. The complete agency name and address is important to ensure that the funds go to the appropriate agency.

Promoting all of United Way's work in the community. AMOUNT \$ _____

Option B **EDUCATION** Helping children and youth achieve their potential through education
AMOUNT \$ _____

INCOME Helping families become financially stable and independent
AMOUNT \$ _____

Option C **Restricted Contribution** (Minimum \$52 — See reverse for additional information)
AMOUNT \$ _____
 501(c)3 Agency Name and Address (or Agency Code) _____

Don't forget to sign here!

Signature _____ Date _____

Please check the accuracy of all your entries. Thanks for investing in United Way.

Gifts made to United Way of the Greater Seacoast will serve as a record of your contribution to meet IRS requirements. Payroll Deduction Pledges must also have this documentation along with your final 2008 payroll stub. If you have requested we bill you, payments received by 12/31/08 will be included in a tax letter from United Way. Compensation, goods or services have not been given by United Way of the Greater Seacoast in return for this contribution.

**Please complete the Pledges Report Envelope as fully as possible to enable UWGS to maintain the most accurate financial records.
Do not include any special event money with this envelope.**

Campaign Pledges Report Envelope



Pease International Tradeport
71 International Drive
Portsmouth, NH 03801
603-436-5554
www.uwgs.org

Instructions:

1. Please fill out all information below and sign this report.
2. Include all United Way original pledge forms.
3. *Make one copy of all pledge forms for your records (for payroll) AND one copy for each donor for tax purposes.*

The Chief Executive Officer and Total # of Employees section is necessary for accurate campaign reporting.

Organization Name: _____
 Mailing Address: _____
 Chief Executive Officer: _____
 Total # of Employees: _____
 Campaign Manager: _____
 Phone: _____
 Email: _____

The number of forms and total amount pledged for all payroll deduction and cash pledges must be completed.

	# OF DONORS	TOTAL AMOUNT	BALANCE DUE
1. Corporate Gift Bill: <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> monthly <input type="checkbox"/> quarterly <input type="checkbox"/> other _____			
2. Payroll Deduction Pledges			
3. Cash			
4. Checks			
5. Credit Card Payments			
6. Pledges to be billed by United Way			
(add #2 - #6 for each column) TOTALS			

Fill out section 1 if a corporate donation is included with the envelope.

Complete Section 5 for all Credit Card payments – please note if the donor asked to bill a credit card over a period of time. If so, this is not a gift, but a pledge to be billed, and is entered in Section 6.

The billing section must be completed to specify whether or not the company wants to be billed and where to send bills. Phone numbers assist with any billing questions that may come up.

Bill payroll: Monthly Quarterly Other _____
 Payroll Contact: _____
 Telephone: _____
 _____ of Company Representative Date _____
 _____ of United Way Loaned Executive Date _____

The envelope must be sealed and signed at the Company Representative Signature line by the ECM.

Thank you!