

CAMPAIGN GUIDE

Tips for running a successful United Way campaign

United Way
of Central Jersey

LIVE UNITED



Have you ever wished you had the chance to give back to your community?

Have you ever wished you could change the course of a someone's life for the better?

Has your wish just come true?

CONGRATULATIONS
and Welcome to United Way!

You are now part of a group of caring individuals who positively impact thousands of people in need throughout our community.

How are you going to be able to make a positive impact?

By asking one simple question, "Will you please consider giving to United Way?" The number one reason people mention for not giving to the United Way is that they are not asked. This puts you in an extremely important position as the Employee Campaign Coordinator for your organization.

For nearly 90 years United Way of Central Jersey has been in the business of improving lives in our community. By identifying and addressing critical needs, United Way programs help your friends and neighbors.

The resources and tips provided in this guide will help you plan an enjoyable, meaningful and efficient campaign. Please feel free to customize these ideas to meet your organization's needs or interests.

We want you to have a successful campaign and we are here to help! If you have any questions, please call United Way at 732-247-3727.

Why United Way?

UNITED WAY FIGHTS FOR THE HEALTH, EDUCATION, AND FINANCIAL STABILITY OF EVERY PERSON IN EVERY COMMUNITY.

We win by living United. By forging unlikely partnerships. By finding new solutions to old problems. By mobilizing the best resources. And by inspiring individuals to join the fight against their community's most daunting social crises.

United Way works because it is:

LOCAL

Your donation works here in our community helping your friends and neighbors each year, making United Way the best way to help the most people.

EFFICIENT

Through the extensive use of community volunteers, a small staff and a commitment to this community, United Way is able to maintain a low overhead. United Way is the most efficient way to help the most people.

ACCOUNTABLE

Trained volunteers review agency programs and budgets. United Way makes sure your gift supports programs that have proven they are making a difference in our community, making United Way the smartest way to help the most people.

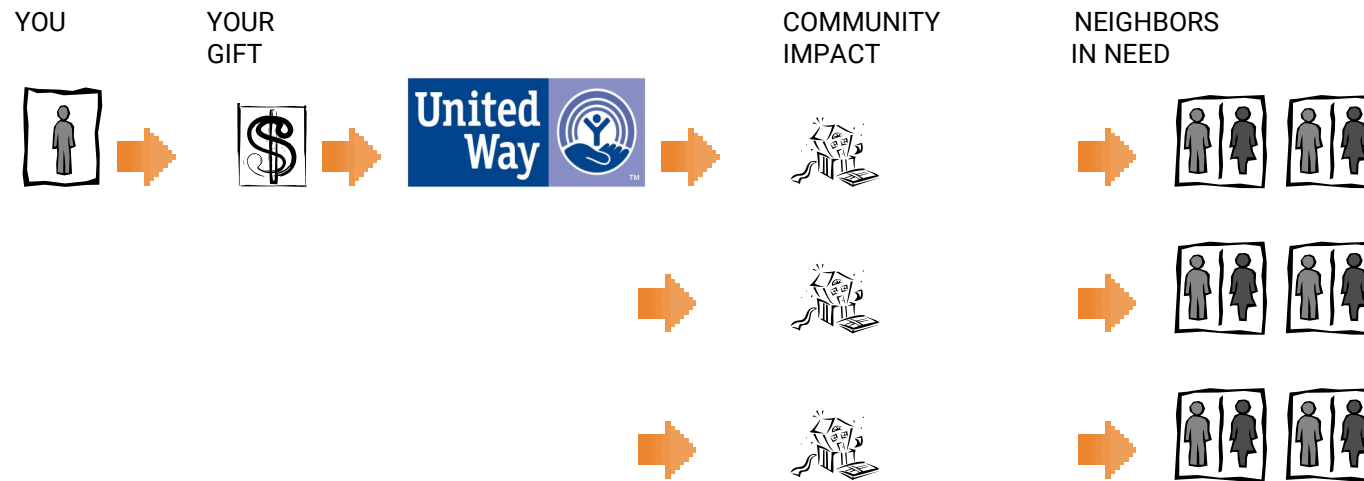
EXPERT

United Way is a proven organized system that continuously evaluates our community's diverse needs and directs fund to those areas that will have the most positive impact in our community, making United Way the expert in helping the most people.

MISSION STATEMENT:

The United Way of Central Jersey works to establish a better community environment by providing leadership to the community by identifying and prioritizing community needs, and raising funds to support approaches that will improve human well being and alleviate human suffering.

How Does United Way Work?



1. You contribute to United Way.
2. Your donation is combined with those of thousands of other individuals.
3. United Way trained volunteers identify and assess needs of local communities.
4. United Way finds solutions to address needs and generates necessary resources—Community Impact.
5. United Way brings together non-profit agencies, government, foundations, and volunteers to implement solutions to identified community issues.
6. United Way sets goals and measures results every step of the way!

INVESTING FOR IMPACT

In addition to investing in community programs that address the needs of children and their families, United Way of Central Jersey works directly in the community through the following initiatives:

Education: The United Way works to help children succeed by making sure they can start school ready to learn, become proficient readers at a young age to enable them to stay on track in middle school, earn their high school diploma and pursue a higher education.

United Way of Central Jersey's Parent Child Home Program (PCHP), a research validated, early literacy, school readiness, and parenting education home visiting program provides intensive home visiting to families with children between the ages of two and four, challenged by poverty, low levels of education, language and literacy barriers. Extensive evaluation and longitudinal studies confirm that children who participate in 2 years of the program have a 30% higher on-time high school graduation rate and score 17 points higher than their peers in cognitive assessments.

Abriendo Puertas/Opening Doors is the nation's first evidence-based comprehensive training program developed by and for Latino parents with children ages 0-5. The program focuses on helping parents to better understand their important role in the development of and long-term impact on their child's educational outcomes, including their child's health, language development, proper nutrition and the need for exercise. Abriendo Puertas also helps parents understand the educational system and how to be their child's advocate as they progress through school.

Financial Stability: United Way empowers people to get on stable financial ground with proven methods like job training, financial wellness classes and more. The result is thriving communities where everyone has more opportunity to succeed.

In Middlesex in 2016, through free tax preparation and education about tax credits, the United Way of Central Jersey filed X,000 free tax returns, saved residents an estimated \$ in fees and helped them claim more than \$ in overall refunds.

Health: United Way is building healthier, more resilient communities by promoting healthy eating and physical activity, expanding access to quality health care and integrating health into early childhood development.

Through its evidence-based Nurse Family Partnership the United Way of Central Jersey works with low-income, first-time mothers to ensure healthy birth outcomes. Research shows a 48% reduction in child abuse and neglect, a 56% reduction in emergency room visits for accidents and poisonings and a \$5.70 return on each dollar invested in the program.

What does an Employee Campaign Coordinator Do?

Your role will be to enable your co-workers to participate in creating a stronger community by planning, organizing and coordinating a successful United Way campaign within your company.

RESPONSIBILITIES:

- Work closely with your CEO and United Way Staff Representative to develop an effective campaign plan, including dates, goals, etc.
- Recruit and coordinate a team of volunteers to assist you—don't try to do it all!
- Request speakers and tours from United Way.
- Coordinate the distribution of campaign materials.
- Coordinate your company or organization's kick-off and recognition events.
- Promote the campaign throughout your company.
- Encourage Leadership Giving in your campaign.
- Educate your co-workers about United Way.
- Invite everyone to give. Make a gift yourself. (Remember that giving is a personal decision and no one should feel that they were coerced to contribute.)
- Make your company campaign fun, take a look at some of the ideas included in this toolkit.
- Complete your campaign by giving a final report and pledge forms to your United Way staff representative.
- Thank donors and volunteers.
- Evaluate and make recommendations for next year.
- Don't forget to keep a folder for next year's campaign. You will be glad you did.

As an Employee Campaign Coordinator, you'll be helping others, but you'll also gain valuable benefits in the process. You'll be able to develop and showcase your leadership and project management skills., network with colleagues at various levels of your organization and help your company shine as a good corporate citizen.

Your Campaign Committee will help you manage your organization's campaign and communicate with employees about United Way.

Ask your CEO or senior executive to help recruit people from all levels of your organization, from each business unit and from every location. Individuals with experience in finance and communications/marketing are also important to include on the committee.

Identifying a co-chair to serve as a resource will not only help you this year, but will also help provide continuity during future campaigns.

The **Campaign Committee** will:

- Help you review the prior campaign and share new ideas
- Assist in developing your campaign strategy
- Be vital in carrying out your campaign plan

Establish specific duties for each campaign team member. All responsibilities and time commitments should be communicated when recruiting volunteers. Duties may include organizing volunteer trainings, setting up special events, arranging education opportunities for employees, managing a leadership giving and/or action group element of the campaign, tracking and communicating campaign results .

Be sure to include a presentation from your United Way representative about United Way's work in the community so the committee can learn about how their campaign dollars are put to work addressing community issues. Keeping your team engaged and informed will help them to be your best advocates for United Way!

Recruit a Campaign Committee



Ten Steps to a Successful Campaign

1. Contact us

United Way can help you establish timelines, provide training, supply materials and address questions. We are here for you every step of the way.

2. Obtain top management support

- Talk to your company's leadership about approving a campaign committee, budget, and allowing use of company time for meetings and activities.
- Ask top managers to publicly support, endorse and participate in the campaign and events.
- Discuss the possibility of matching a percentage of employee gifts with a corporate donation.
- Develop a strategy for engaging company leaders, possibly through the use of a separate leadership campaign.

3. Recruit a Campaign Committee

- Build a campaign team that is diverse and includes individuals from multiple departments and every level within the organization.
- Team members who have been helped or had prior involvement with United Way are a great addition and can speak personally during the campaign.
- Invite United Way to your campaign planning meetings to answer questions and offer ideas.

4. Develop your plan

- Most campaigns run in the fall with a duration of about two weeks but can take place any time during the year.
- Set a campaign goal. Identify some areas for improvement and set some measurable goals to achieve them. Identify a dollar goal, increased participation or increased average gift as your

goals. Talk to United Way for more help in setting your campaign goals.

- Consider incentives that can be used to entice new donors and encourage existing donors to increase their contributions.
- Incorporate fun special event ideas after pledge forms are submitted to keep United Way top of mind.

5. Promote and prepare

- Promote the campaign with posters, flyers and e-blasts. Include campaign communications in company newsletters and through a memo from the CEO.
- Work with your United Way Relationship Manager to ensure that you have pledge forms, brochures, posters, casual day stickers and all other necessary campaign materials for the campaign.
- Send a weekly United Way email during the campaign with United Way facts or stories of local individuals that have benefited from United Way.
- Announce the campaign at various department and staff meetings.

6. Kick off your campaign

- Make your personal gift to United Way before the campaign begins.
- Start your campaign with leadership and senior managers one week prior to your general campaign.
- Invite all staff to a kick-off event that communicates management support, campaign goals & activities. Invite your United Way Relationship Manager to speak at the kick-off and campaign events.

7. Make the ask

- Make sure that everyone is asked to donate at the kick-off and department meetings, and through one-on-one

conversations. The number one reason people say they didn't give to the campaign is because they weren't asked!

- Have the campaign committee personally distribute pledge forms and ask their co-workers to join them in their support of United Way. Be prepared to talk about why you support United Way.
- Show donors the impact that their individual contribution makes. Giving increases when people know their gift is making a real difference. Visit the United Way website regularly to see the impact.

8. Monitor and report your progress

- Keep a running total as the pledges are collected. Compare against the goals identified and provide regular progress updates to employees.
- Make personal follow-ups with individuals who have not turned in their pledge form.

9. Campaign wrap-up

- Collect pledge forms and donations from employees.
- Schedule a meeting with your United Way Relationship Manager to complete all required paperwork.
- Report your final total to employees and leadership.
- Hold a final campaign committee meeting to evaluate your efforts

10. Thank everyone

Send thank you emails, a thank you memo from the CEO, hang up thank you posters. Don't forget to send a special thank you to the campaign committee.



WAYS TO MAKE YOUR DONATION

There are multiple ways to make a donation to United Way of Central Jersey. Your United Way representative will work with you and the appropriate departments at your workplace to determine which ones will best suit your needs:

- **Employee Payroll Deduction** - This is the most efficient way to give. Employee payroll deduction is usually initiated by the chief executive officer or business owner of a company. Payroll deduction is established by completion of the employee's United Way pledge card. This authorizes the company Payroll Department to deduct the indicated amount, usually for each pay period of the following year, for the United Way. Payroll deduction is the most convenient and cost-efficient method for giving. Please note that each pledge card must be signed regardless of the payment option chosen.
- **Cash or Check Contribution** – Some employees and businesses prefer to contribute by cash or check. United Way of Central Jersey requires a pledge card accompany the cash or check and that the check be made payable to "United Way".
- **Credit Cards** – Employees can make a credit card donation on their pledge form or over the phone by calling the United Way office at 732-247-3727.
- **Direct Billing** – Many corporate donations and some employee contributions are received through a direct billing method. The business or individual will indicate a quarterly or one-time billing; United Way will then mail a statement to the appropriate address.
- **Gifts of Stock** – A gift of publicly-traded appreciated stock or mutual funds owned longer than 12 months qualifies for a charitable income deduction of the full market value of the securities. Neither the donor nor United Way are liable for any capital gain tax on the subsequent sale of the stocks or mutual funds. Please ask your United Way representative for a copy of the Stock Donation Form.
- **Estate Plans**—Employees who have named UWCJ in their will or who would like more information about including United Way in their estate plans should contact the United Way office at 732-247-3727.

WAYS TO ENGAGE YOUR EMPLOYEES

Numerous opportunities exist for employees to be engaged in the campaign. Not only does it make the United Way campaign more fun, it allows more impactful experience for those employees who participate. Working together on a project like the United Way campaign fosters teamwork, provides opportunities for volunteering and helps to develop organizational and leadership skills.

Team-Based Activities: Many offices and facilities have incorporated special events as a way to foster teamwork and generate interest in the annual campaign. Some of these have included food and book drives, ice cream socials, Other ideas include Lunch Box Auction, Bake Sale, Build Your Own Ice Cream Sundaes, Nacho/Pretzel Sale, Root Beer Float Sale, Office Olympics, Darts Tournament, Balloon Pop for Prizes, Midnight Breakfast, Group Wellness Event – pledge an amount per 1,000 steps taken, laps around a local park, etc., tour programs supported by your local United Way, planning an activity to benefit the community – clean up a park, plant a garden at a local day care center, etc. and Coin jar collection contests

Volunteer Opportunities: United Way can connect your employees to volunteer opportunities that fit your interests during the campaign and throughout the year. Dedicated service events can take place for a specific period of time on a specific date. You can clean up a beach, build a trail at a local park, read to children in a local preschool program or decorate a classroom, plant a community garden – the options are endless. While many volunteer activities take place outside of the workplace, many United Ways can work with your to tailor an activity to those who cannot leave the office for any length of time. For example, employees at one local corporation have assembled literacy kits for local pre-schools and activity bags for area pediatric hospitals on site in a corporate training room. For those who are interested in longer-tem, skills-based volunteering, your local United Way can connect you to those opportunities as well.

Incentives: If the budget permits, incentives such as movie or theater tickets, restaurant gift certificates, personalized t-shirts and other items of interest can be purchased for distribution to employees giving at a specific giving level or as raffle prizes. No-cost incentives include a day or half day off, a reserved parking space for a month/6 months/a year and dinner or lunch with a senior executive. You can also purchase items from the United Way store at varying pricing levels here: www.unitedwaystore.com.

Co-Branding with United Way – Preferred Provider & Alternative Vendors

If you are interested in creating co-branded products, please know that United Ways must use licensed vendors for purchasing or creating branded products. *Preferred provider* vendors are official network sources for branded products and are licensed to provide products with all the trademarks of United Way. *Alternative vendors* are local vendors who have been licensed to provide products bearing the localized trademarks of United Way. Preferred/Alternative vendors in New Jersey are:

Artcraft Promotional Concepts	Moorestown	NJ	www.artcraftpromos.com
Campus Coordinates LLC	Freehold	NJ	www.campuscoordinates.com
Wicked Thread Embroidery, LLC	Howell	NJ	www.wickedthread.com

VOLUNTEER FOR MORE IMPACT

PLANNING A DAY OF CARING

Days of Caring are a wonderful way to connect your employees to the people, organizations and causes that they support through the annual United Way Campaign. They also serve as team-building opportunities and a chance for individual employees to take a leadership role in coordinating and helping to execute the event(s).

Contact your United Way representative to discuss the type of project you are interested in undertaking. Determine the following:

- Preferred day of the week
- Amount of time you can devote to the project
- Number of volunteers who may be participating
- If you are seeking an off-site or in-house project
- What type of project(s) you would like to engage in – outside (building a Born Learning Trail, cleaning a park, gardening and landscaping) or indoors (sprucing up a classroom/training room at a local agency, reading to preschoolers, assembling/sorting, preparing Literacy Kits, etc.)
- Do you have a budget to provide any supplies?

Ensure that the following are in place in advance of the project:

- Preferred driving directions/parking information to pass along to volunteers
- Schedule of the day's activities including clear starting and ending times
- Elements of the project(s) to be completed. How many volunteers can assist with each task? How long will each task take? Break apart the pieces of each project to ensure all volunteers will have a meaningful experience.
- Snacks/Lunch/Beverages – depending on the time of day, will any food and beverage items be provided to volunteers? Who has the ability to provide these items? Are they necessary?
- Any specific information that the project leader should share with the other members of the volunteer group ahead of the project, i.e. tools to bring, appropriate clothing/attire, additional work supplies, etc.
- Develop back-up plans for all volunteer projects. If your project is taking place outside, develop a plan b in the event of inclement weather.
- Ask United Way about other projects that may be able to be completed in the event your original plans must change or your group works through projects quickly.



Promote the project internally

- Notify your colleagues of the dates(s) and times(s) of your project(s) and encourage them to sign up.
- Include any liability waiver(s) that may need to be signed by your volunteers

Confirm all plans & check back in with United Way:

- Take the time to ensure that everyone has the information they need to make this a successful volunteer experience. This includes sending out information to all group participants that would be helpful for them to know ahead of time and checking in with your local United Way on any last-minute changes.

After the project:

- Thank everyone who participated in the project(s). United Way can also assist after the event by sending thank you letters/emails to each of your volunteers.
- Share any photos with your volunteers and your local United Way.
- “Close the loop” – let your volunteers know how their efforts made a difference. United Way can share any photos they may have taken of how the space/items/activities you engaged in are being used and share them with your colleagues.
- If your group assembled something, ask if you can assist with distribution to United Way’s clients. People appreciate seeing how they have helped.

Contact the United Way of Central Jersey at 732-247-3727 for potential volunteer projects and activities.

UNITED WAY AFFINITY GROUPS

More than just donor clubs, United Way Affinity programs and groups work with United Way to address specific needs in our communities through volunteering while also developing skills and expanding their personal and professional networks. They allow members the opportunity for deeper engagement in United Way's work.

United Way LINC (Lead, Impact, Network and Change)

LINC is focused on meeting the community, philanthropic and networking needs of individuals between the ages of 20 and 32. A new program initially piloted in 8 cities across the country, LINC (Lead, Impact, Network and Change), uses a group-based volunteerism model where the LINC members help to identify and plan volunteer activities and actively recruit their peers to participate. Each LINC event ends with a social and networking activity. The annual LINC donation is \$250, alone or combined with a matching gift from your employer.



The national LINC website, with a listing of participating communities, can be found in the drop-down menu at www.uwlinc.org. For information about the local LINCs please contact Sara Spatz at sspatz@uwcj.org.

Women United

Formerly called Women's Leadership Councils, Women United is a national and local movement of women philanthropists United in their giving and commitment to United Ways. Their collective mission is to "mobilize the power of women to advance the Common Good in our communities".



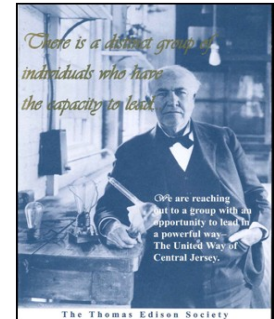
From a handful of determined and passionate women, this fledgling idea has grown into a national network of some 55,000 members in 140 U.S. communities, and the most successful philanthropic effort of its kind. With more members giving more money than any other similar women's group, the United Way Women's Leadership Council has raised in excess of \$1 Billion since its inception more than a decade ago.

The annual Women United donation is \$1,000, alone or in combination with a matching gift. For information and to join Women United at the United Way of Central Jersey please contact June Launay at jlaunay@uwcj.org .

Leadership Giving

The **Thomas Edison Society** recognizes those individuals who choose to make a donation of \$1,000 to \$9,999 to the United Way of Central Jersey. Members have the option to be listed as Leadership donors in UWCJ's Annual Report, participate in special "leadership days of caring" activities and receive special communication throughout the year. Your donation may be alone or in combination with an employer matching gift.

For more information about the Thomas Edison Society and Leadership Giving please contact William Dennison at wdennison@uwcj.org.



Alexis de Tocqueville Society

The **Alexis de Tocqueville Society (ADT)** recognizes local philanthropic leaders and champions in the United States, France and Romania who have devoted time, talent, and funds to create long-lasting changes by tackling our communities' most serious issues. Members make an annual donation of \$10,000 or more to United Way of Central Jersey, alone or in combination with a matching gift from their employer. ADT members at various giving levels are invited to participate in networking events and opportunities locally, nationally and internationally

The Society was named for the French author and aristocrat whose travels in American in the mid-1800's exposed him to our unique spirit of philanthropy which he detailed in his two volume Democracy in America .

For information about the Alexis de Tocqueville Society please contact June Launay at jlaunay@uwcj.org .

SAMPLE EMAILS/LETTERS

Campaign Announcement:

RE: Your Chance to LIVE UNITED

Hello Colleagues:

I am serving as a [captain, or insert role] this year for [insert department/division] in [company name]'s United Way campaign.

United Way fights for the health, education, and financial stability of every person in every community. You can help create positive change for our communities by LIVING UNITED.

Please join me in supporting this year's campaign. Starting [campaign dates] go to [insert link] to find out more and pledge your support. Our department is [insert something you're planning to do as part of the campaign, or the goal you are trying to reach for participation and/or dollars raised].

Together, we can make a difference in our communities. If you have any questions about United Way's work or how to donate, please let me know.

Thank you for your support!

Campaign Reminders

:

Reminder: Our Communities Need You!

Dear Colleagues:

We kicked off [company name]'s United Way campaign on [date] and I thank all of you who have joined us to improve lives and communities.

I hope you've had a chance to learn more about United Way's impact and how your gift helps in our community. Here's a look at some of the ways donations are making a difference in our area [attach/link to a United Way flyer/video—you United Way contact can provide this materials].

Our campaign ends on [date]. Please join us in strengthening [company name]'s impact to support the community.

Thank you for LIVING UNITED!

Thank You to Your Campaign Committee/Volunteers:

Dear [Committee Member Name]:

Thank you for helping [company name] make a difference through our United Way campaign this year.

Our generosity is helping to improve lives and make lasting changes across our communities. Together, we are helping United Way fight for the health, education, and financial stability of every person in every community. [Include any results you want to share – activities, departmental competitions, participation, etc.]

It was a great experience for me to work with so many of you this year. Thanks for LIVING UNITED!

General Thank You to Employees –Should Go Out Over CEO and/or Campaign Chair's Signature:

Dear Colleague:

We have just finished our United Way campaign, and I am happy to report it was our most successful ever! Because you gave generously we were able to raise \$(INSERT AMOUNT) to help our neighbors who need some assistance.

I want to thank you for your participation in this year's campaign and for showing your support for vital services in our community. I am extremely proud of you and the level of commitment shown by all of (INSERT COMPANY NAME)'S EMPLOYEES.

Again, thank you. for LIVING UNITED. Through your generosity you have made it possible for United Way to continue to provide necessary programs to our community.

Ways To Say “Thank You”

Thank You Cards – Use your company’s campaign theme and find a creative way to deliver the cards to make a lasting impression: deliver cards with a candy kiss or balloon attached, insert cards into pay envelopes or personally hand cards to employees as they enter a thank you event.

Thank You Awards – Recognition of groups, departments, individual contributors and volunteers can take many forms: plaques, certificates, trophies or medals, paperweights, desk sets or other gift items. Consider using items from the United Way catalog. Be creative.

Thank You Events –Special events are a meaningful way to wrap up a campaign and show contributors and campaign workers that their efforts are appreciated. Consider a thank you breakfast or lunch hosted by Senior Management, victory rally, thank-a-thon personal telephone calls to contributors, ice cream social, employee barbecue or picnic. Other options include a clown-a-gram to visit the workplace and thank contributors, or hosting a Health and Human Services Fair as special thanks for helping United Way.

Thank You Gifts –The best advice is to keep things simple as you let donors know that their contributions are appreciated.

☒

- ☒ Gift certificates from the company store or a local business.
- ☒ Candy or baked goods.
- ☒ Flowers, buttons, ribbons.
- ☒ Poster with a thank-you message.
- ☒ Calendars.
- Campaign theme pins, key chains, pens mugs.

When considering incentives and thank you gifts, be creative: gift certificates from area businesses or restaurants; use of a prime parking space; time off with pay; candy, flowers, plants.

Public Thank You –A public thank you is often more economical and lets your employees know, as a group, that their contributions are appreciated.

- ☒ Place a banner in a high-visibility area.
- ☒ Provide a popcorn cart in the lobby or cafeteria and offer free popcorn.
- ☒ Offer free coffee or donuts at the start of the workday.
- ☒ Display a giant thank you card signed by United Way staff and agency representatives.
- ☒ Publish a special thank you edition of your company newsletter.
- ☒ Display an enlarged copy of a thank you letter from you as campaign coordinator.
- ☒ Host a United Way photo exhibit with a special thank you message.





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