



United Way

Campaign Coordinator Guide 2000

Five Steps To A Successful Campaign

Make it happen.

United Way of Minneapolis Area

w e l c o m e t o t h e

United Way

Welcome to the world of running a United Way campaign. This five step guide is designed to be a comprehensive and helpful manual for all your campaign planning needs. It is also meant to work in conjunction with our Campaign Coordinator Toolkit on the United Way of Minneapolis Area web site. There you can easily download the individual components you may need in running a campaign for your organization (logos, success stories, sample letters, fact sheets, reporting spreadsheet, etc.). Throughout this guide, whenever you see this symbol ★, you can download that tool off our web site at: www.uwmsp.org/mpls/toolkit.htm.

See page 35 of this guide for a full description of these electronic tools and how to use them.

On behalf of hundreds of thousands of those in our community who will benefit from hard work, thank you for your commitment. You are making United Way work for all of us.

Congratulations on leading your organization's 2000 United Way campaign. You will find that being a campaign coordinator is a fun, fast-paced and rewarding experience. Through your guidance and enthusiasm, you will lead your company in helping United Way address broad community issues and develop long-term prevention strategies.

United Way is committed to driving community solutions, and building a coordinated community response to the underlying issues that limit success for our most vulnerable citizens. And innovative community partnerships, such as Success By 6[®], Minneapolis Promise for Youth and Day One Project, are each evaluated on their impact in changing people's lives.

United Way is there to help all of us. It's a universal solution. It's the best way we can give back to our community and ensure that when we need help, someone will be there to help us.

We know being an effective campaign coordinator requires leadership and commitment, and United Way is here to help you run the best campaign possible. Your campaign consultant or United Way staff can answer your questions and give you fresh, exciting ideas.

On behalf of all members of our community, we thank you for taking the responsibility of coordinating your United Way campaign this year. You are such an integral part of United Way's dedicated effort to enrich the quality of life for all of us. Because of you, together we can make it happen!

Sincerely,

Irv Weiser
Chairman, President & CEO
Dain Rauscher
United Way Campaign Chair



Irv Weiser

United Way Campaign

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step one **Role**

Your Role As a Campaign Coordinator

United Way Campaign

u n d e r s t a n d i n g y o u r R o l e

What is a Campaign Coordinator?

When you act as campaign coordinator for your organization's United Way campaign, you are joining forces with thousands of other committed volunteers from our community. Your dedication helps United Way do what it does best – bring the community together and solve problems before they impact people's lives.

As a Campaign Coordinator, Your Role Is To:

- Provide leadership and direction for the United Way employee campaign within your organization and motivate others.
- Ensure that all employees are provided with information and solicitation materials, and are given an opportunity to contribute and be recognized for their contribution .
- Help employees understand that their contribution directly affects their family members, friends, neighbors, co-workers and other people in our community who use United Way funded services.

Specific Duties:

- Become familiar with United Way, its value, funded agencies and key messages.
- Operate as a liaison between employees and your United Way campaign consultant* and/or staff in securing resources for the campaign.
- Recruit and train a team of employees, representative of all departments and levels within your organization, to plan the campaign and solicitation of fellow employees.
- Plan components of your campaign to include education, promotion, and solicitation of all employees.
- Establish participation and giving goals.
- Establish a campaign timeframe.
- Monitor and report progress of your campaign.
- Keep United Way and top management of your organization informed of issues, plans, and progress of the campaign.
- Complete and submit all necessary reporting information.
- Report final campaign results.
- Thank employees and committee for their involvement and support.

* Formerly called loaned executive, the newly-named campaign consultant is available to assist you in planning and conducting an employee campaign.

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step two **Learn**

Learning about United Way

United Way Campaign

becoming familiar with United Way

UNITED WAY IS COMMUNITY ... Only United Way looks at broad community issues and develops long-term prevention strategies, while remaining flexible to meet existing gaps in need. Here are some other key facts and messages about United Way.

Who We Are

About United Way

United Way of Minneapolis Area is a local, independent non-profit organization run by volunteers from all segments of our west metro community. United Way solves problems in many ways. The two most significant ways are as a leader in community partnerships and funding services:

- Brings business, government, schools, health care and social services together as partners in efforts like Success By 6®, Minneapolis Promise for Youth and Day One Project. This coordinated community response helps streamline services so people get help faster and more efficiently.
- Funds 275 programs at 144 health and human service agencies in Anoka, Carver, Dakota, Hennepin and Scott counties that provide a broad range of services.

United Way's Mission

United Way is a partnership of donors and providers of service joined together in an organized effort to build a more self-sufficient community.

Building Successful Futures for Children, Youth and Families

- 71 percent of the \$60.2 million raised last year by United Way supports children, youth and families.
- 65 percent of funding supports preventative services dealing with issues such as poor school performance and juvenile delinquency at early stages.
- In 2000, United Way has earmarked an additional \$3.8 million for innovative approaches to emerging issues, existing gaps in services and removing barriers to service access.
- Over 90 cents of each contributed dollar goes to services that help people in need, higher than that of any major charity.

g u a r a n t e e i n g t h e F u t u r e

Twenty-four hours a day, seven days a week, services funded by United Way help one in four people in our community. Through your commitment you:



- ★ Help families overcome the effects of violence, abuse, job loss and divorce so they can provide a caring and stable home for their children.



- ★ Support mentorship and marketable skills for youth to improve academic achievement and reduce youth violence.



- ★ Provide older adults help with meals, chores and activities that keep them independent in their homes and allow them to continue to be active in the community.



- ★ Help families find affordable housing and help them obtain long-term livable-wage employment through job training and access to transportation



- ★ Connect youth to volunteer opportunities that link them to diverse cultures, opening their minds to understanding and acceptance.



- ★ Ensure people have access to affordable health care, including preventive care such as immunizations and check-ups. And help people cope with major diseases such as cancer, heart disease, diabetes and AIDS.

United Way Campaign

united way: linking people to the Community

In addition to creating community partnerships and funding local agencies, United Way of Minneapolis Area also serves our community through First Call For Help®. And for volunteer opportunities, you can contact the Volunteer Resource Center of the Twin Cities (a United Way funded agency) at 612-379-4900. These are services that employees in your organization may want to know more about. Ask your campaign consultant for more information.



- ★ First Call For Help is a 24-hour information and referral center that serves over 125,000 people each year. First Call For Help refers people to agencies, services and activities metro-wide. Call 651-291-0211.



united way: make it Happen

Make It Happen is United Way's campaign theme and has been incorporated into many of United Way's campaign marketing and advertising materials. It focuses on the many ways your donation to United Way makes so much happen to strengthen our community.

Children, youth and their families continue to be a focus of United Way support, demonstrating the community's commitment to a successful future for all kids.

Keep these themes in mind at rallies, special events, campaigner training, and during Week of Caring. In fact, you may want to tie them in with your own organization's events and messages to drive home the fact that if we all pull together, we can make it happen for children and youth in our community.

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step three **Plan**

Planning for a Successful Campaign

United Way Campaign

developing your campaign Plan

These are the steps to take in organizing and developing a fun and successful United Way campaign for your organization.

Secure Top Management Support

The visible support of your CEO or organization leader is important to any campaign's success.

Ask your top executive to:

- Announce your role as coordinator.
- Appoint next year's campaign coordinator to work with you. This will ensure smooth succession next year.
- Approve time for campaigner training, employee rallies and other campaign events.
- Endorse the campaign personally in a letter or at an employee rally (See Leadership Letters section).
- Identify a plan for Leaders in Giving solicitation and, if appropriate, appoint a Leaders in Giving coordinator.

Assemble Your Team

Meet...

- With last year's campaign coordinator to discuss areas of growth and ways to improve.
- With your United Way campaign consultant to discuss:
 - Three-year history of your employee campaign.
 - Ways to increase the average leadership or employee gift, overall participation, union involvement, Leaders in Giving efforts or percentage of payroll deductions.
 - New ways to improve your campaign through training and using United Way campaign materials and giving guides.

Select...

- **A team to help plan and run your campaign.**
 - Include people from all levels of your organization.
 - Include your organization's communicator and invite a union representative.
 - Assign specific duties that use each team member's skills, talents or sphere of influence.
 - Set a schedule for your campaign and plan to meet regularly.
- **Campaigners to help solicit employees.**

These people are very important to the success of your campaign! Campaigners are employees who meet one-on-one with others, ask them to give to United Way and answer questions they may have. For individual solicitation, one campaigner should be recruited for every 10-15 employees. Campaigners will need to follow-up with those who are unable to attend rallies or make a pledge commitment at rallies.

Campaigners should be:

 - Supporters of United Way.
 - People who have used a United Way participating agency if possible.
 - From all levels of your organization.
 - Enthusiastic and efficient in approaching others.
- **A team to organize Week of Caring.**

Week of Caring is used as a campaign kick-off for many organizations. Work with the Week of Caring team to coordinate informational meetings with rallies. It's a fact that organizations who participate in Week of Caring have a significant increase in contributions over those who don't (see Week of Caring, pg. 17).

determine your potential for Giving

Establish your employee campaign goal based on a “potential” of all employees giving at the giving guide level (see suggested giving guide on page 12).

Estimate your organization's average salary for this year:

$$\text{\$ } \frac{\text{gross payroll}}{\text{number of employees}} = \text{\$ } \frac{\text{average salary}}$$

Multiply average salary by suggested giving guide percentage:

$$\text{\$ } \frac{\text{average salary}}{\text{giving guide percentage}} = \text{\$ } \frac{\text{"potential" contribution per employee}}$$

Multiply “potential” per employee by number of employees:

$$\text{\$ } \frac{\text{"potential" contribution}}{\text{number of employees}} = \text{\$ } \frac{\text{full potential}}$$

Divide last year's total employee dollars raised by full potential:

$$\text{\$ } \frac{\text{last year's employee campaign}}{\text{full potential}} = \frac{\text{"\% of full potential achieved last year"}{\%}}$$

$$\frac{\text{"\% of Your Potential = this year's goal"}}{\%} = \text{\$ } \frac{\text{goal}}$$

A Recognition Program Change in 2000:

For the first time, the Gold, Silver and Bronze awards will be given to organizations with outstanding per capita giving at three levels:

- **Gold - \$250+ per capita**
- **Silver - \$150-249 per capita**
- **Bronze - \$100-149 per capita**

In prior years these awards were based on a comparison of an organization's giving in relation to its calculated potential to give.

Campaign

Based on the experience of organizations who have had the most successful campaign results, follow these twelve steps to ensure the success of your campaign.

LEADERSHIP: Commitment for Success

1. Top management supports and gets involved in employee campaign.
2. Campaign coordinator understands his or her role, the role of the campaign consultant and how the two roles work together.
3. Leaders in Giving Program is a key part of the campaign.
4. Campaign dates and challenging goal set, based on organization's potential to give.

MAKING SUCCESS MANAGEABLE:

People, Time, Money

5. Provide payroll deduction with personalized pledge cards.
6. Campaign planning team and campaigners recruited from all parts of the organization, including retirees and organized labor representatives, if applicable.
7. Campaign volunteers trained, including committee members and campaigners.
8. Personal or group solicitation is conducted to help employees make informative decisions about giving. Leaders in Giving and retiree solicitation is also conducted.

CREATING A POSITIVE CLIMATE FOR GIVING

9. Educational activities are used during the campaign and throughout the year—employee information meetings, agency tours, speakers, videos and literature.
10. Special events, participation in Week of Caring, activities and publicity make the campaign fun and motivational.
11. Results are reported on a timely basis and everyone is thanked.
12. United Way program for new hires is established.

* See the Great Ideas section of the United Way of Minneapolis Area web site for tips, tricks and creative ideas from coordinators. Go to "For Coordinators" within the Campaign section.

set a challenging Goal

Campaigning to potential will help you look at growth possibilities for your campaign before you set a goal. Establish your organization's potential by following the worksheet on page 10. This worksheet will show you how much your organization could contribute if everyone gave at the suggested giving guide level.

Suggested Giving Guide Level

Average Salary	Suggested Level	Bi-weekly Amount
Up to \$14,999	.006	Up to \$3.70
\$15,000 to \$19,999	.008	\$4.60-\$6.20
\$20,000 to \$34,999	.01	\$7.40-\$13.80
\$35,000 to \$49,000	.015	\$20.00-\$29.00
Over \$50,000	.02+	\$38.50+

include special Solicitations

United Way's Leaders in Giving Program is designed for those employees willing to demonstrate community leadership and able to donate gifts of \$1,000 or more. This strategy is easy to implement in a company of any size and can be an excellent source of new dollars for your campaign.

Leadership levels in the Leaders in Giving Program are:

Century	\$100,000 +
Founder	\$50,000 to 99,999
Builder	\$25,000 to 49,999
Cornerstone	\$10,000 to 24,999
Keystone	\$5,000 to 9,999
Pillar	\$2,500 to 4,999
Capital	\$1,000 to 2,499

To assist you with a Leaders in Giving Program, ask your chief executive officer to appoint a Leaders in Giving coordinator who will organize the solicitation of these individuals. The Leaders in Giving coordinator will focus on solicitation and recognition.

United Way Campaign

Solicitation:

- Identify potential Leaders in Giving participants who earn more than \$50,000 annually and/or whose annual contribution approaches \$1,000.
- Those who give \$5,000, or have been identified for special solicitation, may be solicited by a United Way volunteer. Talk with your campaign consultant about these donors. Their gifts will still be included in your employee campaign total.
- Send a letter from the CEO or other leadership staff to current and potential Leaders in Giving donors along with Leaders in Giving materials.
- Plan for one-on-one solicitation meetings between potential donors and internal donors.
- Hold a breakfast or lunch with current and potential Leaders in Giving donors including a presentation by the CEO or other leadership staff supportive of United Way.
- Hold a breakfast or lunch for current and potential Leaders in Giving donors with a presentation by an external speaker or agency speaker (United Way will find a speaker for you).
- Have current and potential Leaders in Giving donors visit a United Way agency.
- Have current and potential Leaders in Giving donors participate in a Week of Caring event.
- Personally thank all individuals who make contributions of \$1,000 or more.

Recognition

- The Leaders in Giving Program recognizes individuals and couples who contribute \$1,000 or more annually at the leadership levels listed on the previous page. Donors eligible will be found in executive, administrative and management levels and elsewhere throughout the organization.
- Couples/partners who give separately may combine their gifts for recognition at a higher level.
- Emerging Leaders are eligible for recognition at double the amount pledged (see page 15 for details).

Your Leaders in Giving

Coordinator Should:

- Distribute pledge/recognition forms at the time of solicitation to all employees targeted as Leaders in Giving participants.
- Review your company's payroll records after the campaign to identify those who pledged over \$1,000 annually. For example, those who pledge a minimum of \$42 each pay period for 24 pay periods or \$39 each pay period for 26 pay periods are eligible for Leaders in Giving recognition and should be given a recognition form.
- Enclose completed donor pledge/recognition forms in your campaign report envelope at the end of the campaign or return to United Way by December 31, 2000.
- Report the number of Leaders in Giving donors at each leadership level on the form provided (this includes those outside your target management group too).
- Donors may mail their recognition forms directly to United Way by December 31, 2000.

Leaders in giving Results

Campaign coordinators should complete this form when all campaign results are final. Return this sheet, or a copy of it, to United Way in the campaign report envelope.

Name of Company/Organization:

Acct. No.:

A. Did your company conduct a Leaders in Giving program to **specifically solicit gifts of \$1,000 or more?** If so:

How many employees were included in this special solicitation effort?

B. For your company to receive United Way recognition, please indicate below the number of donors(including anonymous) who contributed at each leadership level. **These donors may be found throughout the employee campaign.** Note: Please include donors in the level that corresponds to their **actual** donation at your organization. Recognition levels will be adjusted by United Way for donors who:
1) combine their gift with a spouse/partner and/or
2) are eligible for the Emerging Leaders Program.

Century members	\$100,000 +	<input type="text"/>
Founder members	\$50,000 to 99,999	<input type="text"/>
Builder members	\$25,000 to 49,999	<input type="text"/>
Cornerstone members	\$10,000 to 24,999	<input type="text"/>
Keystone members	\$5,000 to 9,999	<input type="text"/>
Pillar members	\$2,500 to 4,999	<input type="text"/>
Capital members	\$1,000 to 2,499	<input type="text"/>

Remember: for individuals to receive United Way recognition they must complete and turn in a recognition form.

e m e r g i n g Leaders Program

What is the Emerging Leaders Program?

The Emerging Leaders Program is designed to connect individuals under 40 years of age to community involvement through United Way of Minneapolis Area. The purpose of the program is to create a network of young community leaders committed to supporting health and human services by investing time, talents, and resources in our community. The four areas of focus include:

<u>Awareness</u>	Learning about important community issues and understanding how to personally make a difference.
<u>Volunteerism</u>	Participating in individual and group volunteer projects at United Way funded agencies
<u>Leadership</u>	Serving in leadership positions at nonprofit agencies to help improve the quality of health and human services in our community.
<u>Charitable Giving</u>	Pledging financial support to United Way of Minneapolis Area's annual campaign. Note – Although the program is a complement to Leaders in Giving, there is no minimum pledge required to participate.

How is the Emerging Leaders Program a Complement to Leaders in Giving?

Individuals and/or couples contributing \$500 or more are eligible to receive recognition at double the amount pledged in United Way's leadership giving levels. This is not a gift-matching program. It is a recognition component of the program that provides Emerging Leaders with an extra incentive to become a Leader in Giving. It is also intended to encourage future charitable leadership.

How Do I Promote the Emerging Leaders Program?

Promoting the program through your company campaign is an excellent strategy to motivate younger employees to participate in the campaign as well as become involved in the community. The program is recommended for individuals under 40 years of age. Employees self-identify based in their age – it is not the coordinator's responsibility to verify eligibility. Individuals in all levels of employment should be encouraged to participate.

What to do:

- Include information about the program in campaign communications and activities.
- Appoint a contact person to coordinate campaign efforts for the Emerging Leaders Program. Ideally, this should be someone other than the Employee Campaign Coordinator.
 - Distribute program brochures (includes a detachable sign-up form).
 - Have a group of employees interested in joining the program visit a United Way agency or participate in a Week of Caring event.
 - Arrange for a member of the Emerging Leaders Program Committee or other program participant to speak to a group of employees about the program.
 - Present information about the program at a Leaders in Giving solicitation meeting.
 - Encourage interested employees to participate in upcoming program activities.

Retirees

Boost your fund-raising results and renew contact with people who are committed to your organization by involving retirees in your campaign. Conducting a retiree campaign will also help increase their knowledge about United Way programs available for older people.

Here's how to include retirees:

- Involve a retiree representative in the planning and solicitation.
- Decide if solicitation will be a direct mail letter, invitations to an employee rally or a special event just for retirees.
- Consult with your organization's human resources and payroll department to let them know what you plan.
- Offer automatic deduction from the retirees' pension check or automatic pledge payment plan, which is a direct deduction from their bank account.
- Give retirees the opportunity to give to United Way of Minneapolis Area or to designate to a United Way in their retirement community.
- Report results on your campaign report. Retiree gifts should be included with total employee gifts.

Things to Try:

- Personalize all correspondence. Provide a pre-paid return envelope.
- Give retirees the opportunity to go on agency tours or participate in Week of Caring.
- ★ • Print stories about how older people are helped by United Way agencies in the retiree newsletter.
- Use United Way DISCOVERY® program materials (year-round education program) in pre-retirement seminars to educate retirees about local resources and volunteer opportunities.
- Give retirees the opportunity to learn about United Way's Great Giving Program. The Great Giving Program promotes giving by bequest, retirement accounts and other planned methods. A Great Giving presentation gives retirees the opportunity to learn about topics such as estate planning, charitable planning and legacy gifts.
- Don't forget to say thank you!

a d d

Pizazz!



★ United Way's WEEK OF CARING

What is Week of Caring?

Week of Caring offers groups a chance to volunteer on projects at various United Way funded agencies. Employee groups are matched with projects that best meet their interests, talents, skills and geographic location.

When is Week of Caring?

Although the official Week of Caring is August 12-19, projects are available July 1-October 31.

Schedule your project(s) when it fits best with your organization's United Way campaign.

Why should our organization participate in Week of Caring?

Week of Caring provides a unique opportunity for employees to make a difference in our community. It helps employees see, first-hand, how their donations to United Way are helping people in our community.

Thanks to Target's sponsorship of Week of Caring, participants can order free T-shirts for their group as a special volunteer thank you.

Week of Caring Helps Increase Campaign Results

Week of Caring is a proven, successful fund-raising activity. In addition to the benefits that agencies receive, organizations are finding that involving employees increases participation in their United Way campaigns and the average employee gift is over 50 percent greater.

Where is Week of Caring?

EVERYWHERE! There are project sites at United Way agencies throughout the metro area.

How Can You Participate?

You can sign up for Week of Caring projects on United Way's web site at www.uwmisp.org. Click on "Campaign" and then go to the Coordinator section. You can also download the Week of Caring form and return it to United Way via fax at 612-340-7675 or by mail.

special events and Activities

Special Events & Activities

To the right is a compilation of exciting, effective and low-cost events that you can use during your employee campaign to raise extra dollars and have extra fun learning about our community.

- Waffle or pancake breakfast, served by management
- Spelling bee pitting employees against management
- Walk/run-a-thons, with employees pledging per mile
- Food drives, clothing drives
- Carnation or flower sales
- Car washes
- Tricycle races
- Baby photo contest, grade school photo contest
- Goofy Olympics or triathlons, canoeing with one paddle, three legged racing, etc.
- Ice cream social
- Children's coloring contests
- Potluck luncheons
- Potluck cookbook – recipes are brought with food donation and made available for sale to employees in book form
- Dunk tanks
- Paper airplane tosses
- Silent auctions with items donated by management, employees or vendors such as: use of parking spaces, refinishing furniture, tax prep, golf lessons, free condo use, Christmas cookies, leaf raking, gourmet dinner
- Joke books – employees submit their favorite jokes
- Guess the height and weight of the Heavy Weight – employees guess the combined height and weight of management staff or specific departments
- Watermelon seed spitting contest
- Basketball shooting contest
- Extra vacation day
- Dessert (bake) sales of desserts donated by employees; Hot Dog sales
- Beep-ball played blindfolded to sensitize employees to the challenges of living with a visual impairment
- Balloon busts: executives sit on balloons to burst in least amount of time
- Pizza luncheons
- Hawaiian shirt day
- Sweatshirt day/dress down day
- Western theme day
- Casino night
- Pie eating contest
- Pie throwing contest: pies (whipped cream on paper plates) are thrown at management staff as they place face in opening of cardboard screen
- Cribbage/500 tournament held over noon hours
- Jail and Bail
- Mystery hunt with clues sent via e-mail, leading hunters to an agency or co-worker who is connected to an agency
- Yo-Yo contest
- Lip sync contest/air guitar contest
- Turtle derby
- Car shows
- Flea market/white elephant sales
- Garage sales
- Crazy hat day
- Bubble gum blowing contests

If you have questions, please call your United Way campaign consultant.

United Way Campaign

use internal Publicity

If your organization has a person in charge of communications, you have a terrific resource for publicizing and making your campaign fun. Your communicator can use many vehicles to promote your fund-raising efforts, and United Way produces many tools to make that communication informative and easy to use:

- Utilize bulletin boards, audio-visual presentations, e-mail, voice mail and special graphics.
- ★ • United Way produces camera-ready drop-in ads about community facts and services that can be reprinted in newsletters and flyers.
- United Way also supplies campaign posters that you can post to help you get your campaign message out.
- ★ • United Way can supply you with success stories about local people who have benefited by using a United Way funded program. These are great to use in newsletters or in presentations.
- ★ • United Way fact sheets detail issues that affect our community and the results and improvements made in local people's lives by United Way funded programs.

For more information on the tools available, ask your campaign consultant or call United Way's marketing department at 612-340-7555.

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step four **Implement**

Working Your Campaign Plan

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implementing the Campaign

You're ready now to roll up your sleeves and activate your campaign. This section will give you the fundamentals, as well as other ideas to personalize your strategy.

Campaigner Training

Train your team of campaigners to ensure a successful campaign. It can save time and increase the success of your campaign. Train campaigners to help them:

- Feel confident in asking co-workers to give.
- Realize how important they are to the campaign.
- Understand United Way and how it helps the community.
- Answer questions and help others make informed decisions about giving.
- Personalize the benefits of giving.
- Understand the logistics of their job.

Your campaign consultant or United Way staff person can train your campaigners or assist you in training them. We recommend spending at least an hour on training. A shortened training agenda is available if that isn't possible (see end of section).

Use United Way materials for campaigner training. Request materials from your campaign consultant. Don't overwhelm campaigners with a big pile of handouts; use these for the best results:

- Campaigners Guide
- United Way campaign brochure
- Payroll deduction pledge card
- Videos:
 - “Think Again” (3 min.)
 - “Voices of the Community” (5 min.)
 - “Karma” (4 min.)
 - “Celebrate Living” (4 min.)
- United Way T-shirt, pen, logo pin or other item

o n e h o u r t r a i n i n g A g e n d a

One Hour Training Agenda (tailor to fit your needs)

1. Thank you (5 min.)

From top leader(s) of your organization;
also labor union leader, if applicable:

- Thank you for volunteering to help with our United Way campaign.
- You have our full support to take the time to do this job well.

2. Ice breaker (5 min.)

Activities that involve the group and help them feel comfortable:

- Share your personal reasons for volunteering on the campaign and ask them to share theirs.
- Have them pair up and list as many United Way agencies as they can in one minute.

3. Understanding United Way (20 min.)

- Show a United Way campaign video.
- Hand out the campaign brochure. Have campaign consultant or United Way staff answer questions.

4. How to ask for a donation (20 min.)

- Ask questions and discuss:
 - Who has solicited people before and how?
 - How have you been solicited in the past?
 - What works well and what doesn't?
 - Why do you feel some people don't give to United Way?
 - Market research shows one of the most common reasons people don't give is "no one ever asked me"; their job is to make sure everyone is asked.
- Review Campaigners Guide; discuss each step and have campaign consultant cover question and answer section.
- Hand out sample pledge card; answer questions about how to fill it out.
- Instruct campaigners to get pledge cards as needed (disregard this step if you are running a flex or area campaign).

5. Campaign logistics (5 min.)

Explain and answer questions about:

- Procedures for pledge card collection.
- Reporting dates to chart campaign progress.
- Dates and times of campaign events.
- Incentives for turning in pledge cards (prize drawings, etc.).

6. End on a positive note (5 min.)

- Show "Celebrate Living" video.
- Thank campaigners once again and give them a United Way T-shirt or other item to identify themselves as campaign volunteers.

If you only have 30 minutes for training ... use only these steps:

1. Thank you (5 min.)
2. Understanding United Way (5 mins)
 - Hand out campaign brochure and have campaign consultant or United Way staff explain how United Way works.
3. How to ask for a donation (15 min.)
 - Skip discussion at beginning.
4. Campaign logistics (5 min.)
 - Thank them and distribute United Way pins, T-shirts, mugs, etc.

If you can spend two hours or more on training ... expand the one-hour training agenda in any of the following ways:

Tour a United Way participating agency to see funded programs in action. Have campaign consultant schedule the tour 2-3 weeks in advance.

Practice answering questions (20 mins).

- Break into groups of three and assign a role for each person: potential donor, campaigner, observer.
- Roleplay in groups to practice answering questions in the Campaigner Guide or handling objections to giving.
- Discuss the difficulty of questions. Have campaign consultant clarify answers as needed.

Ask an employee who has benefitted from a United Way funded program to share their personal story (10-15 mins).

Show one of this year's United Way campaign videos.

Listen to a United Way agency speaker talk about how United Way dollars help people in need.

- Available for groups of 25 or more.
- Have campaign consultant request a speaker 2-3 weeks in advance.

make giving Easy

Payroll Deduction

Giving by payroll deduction is the most convenient way for an employee to contribute, and an effective way to solicit. If payroll deduction is not currently used at your organization, United Way staff can help you establish the procedure.

Credit Card

Donors can also pledge a one-time gift to be paid by credit card. United Way of Minneapolis Area will accept payments made through Visa, Mastercard, Discover and American Express.

Stock Gifts

Donating appreciated securities (stocks) is an attractive method of paying pledges since the deduction for the donation is based on the current fair market value. By eliminating the cost of paying taxes on the capital gains, a donor can "donate more and feel it less". See sample letter on page 34.

Customized Pledge Forms

Sometimes organizations cannot use United Way supplied pledge forms and need to design their own. In this case, a United Way staff person will be happy to consult with you on how to design a pledge form with the elements you need to make it an effective fund-raising tool. Tell your campaign consultant you need assistance.

Contributions can be tax-deductible, and no commercial goods or services are provided in exchange for donations. If a single payment of \$250 or more is made, United Way will issue a receipt to the donor for tax purposes. For those giving by payroll deduction, the last payroll receipt of the year will serve as their contribution receipt.

Please communicate this information to campaigners during their training.

the Rally

1. Send a memo, e-mail or flyer to all employees stating the purpose of the rally one week before rally (see Leadership Letters section, pg. 31).
2. Give each employee a personalized pledge form and a campaign brochure.
3. Campaign coordinator gives the opening remarks.
4. CEO/manager/labor representative addresses group.
5. Speaker: If possible, have an employee speak who has used United Way funded programs or services. If not, use an employee who has volunteered or a speaker from a United Way agency.
6. Show United Way campaign video.
7. Campaign consultant: Gives overview of United Way and delivers the main “ask” for contributions to United Way.
8. Group or personal solicitation (see below).

Solicitation

Solicitation

Conduct solicitations, in addition to an employee rally, to help employees make an informed decision about giving. Solicitation can be either group or personal. Your campaign consultant can help you decide which best fits your organization.

Group Solicitation

For an audience of 20 to 30 people, you'll need 20 to 30 minutes. Follow the guidelines above for a rally, however at the close, have the campaign coordinator:

- Explain suggested giving guide and pledge form.
- Ask for payroll deduction pledges.
- Thank employees for giving.
- Collect pledge cards.
- Have campaigners collect pledge forms from employees who did not attend the rally.

Personal Solicitation

Follow the guidelines above for a rally, however at the close:

- Have campaigners begin individual solicitation that day and conclude within the week.
- Each campaigner will personally contact 10 to 15 employees, collect their signed pledge forms and return them to the campaign coordinator.

* See page 28 for special instructions on submitting checks immediately.

Understanding
Your Role

Becoming Familiar
With United Way

Developing Your
Campaign Plan

Implementing The
Campaign

Follow-Up
and Reporting

Appendix: Using
Resources and Tools

step five **Wrap-up**

Say "Thanks" and Report Results

United Way Campaign

follow-up and Reporting

Way to go! Your campaign is completed. Now don't forget to thank employees, report your results to United Way and get your organization recognized for outstanding results.

Thank Your Fellow Employees

Once your campaign is complete, it's important to thank all employees for giving to United Way and helping our community. There are a number of ways to do this:

- Send a thank you letter from your CEO or labor representative (see example on right).
- Plan a special event during the lunch hour (see Special Events & Activities section).
- Give United Way promotional items to employees who contributed, like balloons, mugs, T-shirts, denim shirts, tote bags and pins (see order form in campaign package).
- Put a flower on each person's desk with a short thank you note.

★ Sample Thank You to Employees

Dear Employee,

Thank you for being a part of our 2000 United Way campaign effort! Our employees have pledged a grand total of \$_____ This money will help thousands of local people by providing health and human service agencies in Anoka, Carver, Dakota, Hennepin and Scott counties.

Your contribution changes lives, and because of your gift, babies will be born healthier, families will become self-sufficient, and older people can live independently. United Way's approach to looking at broad community issues and developing long-term prevention strategies will produce positive results next year in thousands of people's lives.

Thanks again for caring and for your personal contribution to our campaign. Together we are building a strong community.

Sincerely,
(CEO signature and name)

report the Results

Timely reporting of results, even partial results, is important. Once the majority of pledge forms are collected, make an initial report. Reporting on a periodic basis helps United Way process donations in a timely manner and respond to donor requests for special billing, stock giving and designation of contributions.

- Use the campaign report envelope that was given to you by your campaign consultant.
- ★ • To calculate totals, use the electronic reporting spreadsheet downloadable off the United Way web site.
- Return all special pledge forms and copies of triplicate pledge forms in the envelope as soon as your campaign is completed. All envelopes must be returned to United Way by December 31, 2000.
- Remember: your organization retains a copy of payroll deduction forms, however you must report the totals on the campaign report envelope.
- On the envelope, fill out only the amounts/contents that are enclosed.
- Sign and return to your campaign consultant.
- You may need to use more than one envelope. Report contents separately.
- If your organization runs an extraordinary campaign, ask campaign consultant to fill out a nomination sheet for recognition in the United Way Today newsletter.
- Review checklist on the envelope to see that you've completed everything and return to campaign consultant.

Note: As special events are held and donations are made, checks must be submitted on a timely basis. No checks can be held for more than 30 days after the date written.

get Recognized

When you reach your potential in employee dollars raised, United Way will recognize your efforts in the following ways depending upon the percentage you have raised, and the uniqueness of your campaign:

- Report Luncheon / Campaign Celebration
- Annual Meeting
- Annual Meeting Highlights Book
- Leaders in Giving Highlights Book
- United Way Today Newsletter

For more information on how to get your organization recognized for an outstanding campaign, contact your campaign consultant.

United Way Campaign

Understanding
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Appendix: Using
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appendix **Tools**

Helpful Resources and Tools

appendix:using resources and Tools

Have questions? Need Information?
Looking for tools for your campaign?
Look no further than right here.

Educational Tools

United Way's Community Education Center has the tools you need to help people understand how their United Way contributions help people in need in our community. Ask your campaign consultant or call 612-340-7623 for more information on the following activities.

Speakers

Your campaign consultant is your main speaker and can give an overview of United Way at rallies and meetings. Volunteer speakers are also available to speak about United Way and participating agencies that provide services in the following areas, as well as specific United Way efforts:

- Strengthening Families
- Nurturing Children and Youth
- Supporting Older People
- Increasing Self-sufficiency
- Respecting Diversity and Ending Discrimination
- Promoting Health and Healing
- How volunteers distribute contributions
- First Call For Help®
- Success By 6®
- Minneapolis Promise for Youth

Agency Tours

Many United Way participating agencies offer tours of their facilities. Tours vary in length from 30 to 90 minutes and are available for groups of 5 to 25 people. Please give 2 to 3 weeks notice.*

Displays

Some United Way participating agencies have portable displays depicting their services that can be set up at your location. Various United Way displays are also available.

Videos & Equipment

Use videos in your campaign to provide education, motivation or training. They are available in a number of formats. Portable VCR's are also available for your use. Videos available include: "Celebrate Living" (4 min.), "Voices of the Community"(5 min.), "Think Again" (3 min.), "Karma" (4 min.).

Banners

A limited number of nylon banners featuring the United Way logo are available in various sizes to visually heighten awareness of United Way during your campaign.

* Agencies offering tours are noted in the Community Services Guide

Leadership Letters

Leadership Letters

Letters can be an effective tool in telling employees that your organization and management support United Way. These sample letters can promote your campaign efforts through personalized mail, company publications or payroll stuffers. Use these samples for ideas or personalize to fit your organization.

★ Sample Campaign Endorsement from CEO

Dear (Employee's Name),

Once a year, each of us has a chance to make a difference in the lives of people in our community through our company's United Way campaign.

(COMPANY) believes we all have a responsibility to the community where we live and work. One of the ways we fulfill this responsibility is by giving to United Way of Minneapolis Area. United Way funds a broad range of health and human services in the west metro area. These services help local people in need, our friends, our family members and ourselves.

Please give to United Way because of the following reasons:

- Through United Way's approach to looking at broad community issues and developing long-term prevention strategies, your gift helps strengthen families, nurture children and youth, support older people, increase self-sufficiency, respect diversity and end discrimination, and promote health and healing.
- United Way enlists the help of volunteers, people like you and me, to study community needs, evaluate programs and make decisions about where contributed dollars are spent each year.
- United Way is very efficient. In fact, over 90 cents of every contributed dollar goes to services that help local people.

To make a difference in our community, contribute to United Way through payroll deduction. It's the easiest, most convenient way to help provide year-round services to those in need.

(COMPANY'S) annual United Way kick-off event will be held (DATE). Our campaign will run from (DATES). Please participate in as many campaign events as possible. It's fun and a great way to learn about local services.

When one of our co-workers who is volunteering for United Way approaches you for a contribution, please say yes, consider the positive changes you can make happen, and invest knowing that together we are building a strong community for us all!

Sincerely,

(CEO signature and name)

Leadership Letters

★ Sample Labor Support Letter

Dear Brothers and Sisters,

As we begin the 2000 United Way community-wide fund-raising campaign, I'd like to take time to reaffirm our ongoing commitment to this organization and to making a difference in our community.

Many of us have personally experienced the importance of our local United Way – one in four people in our community are touched by a United Way funded service. United Way of Minneapolis Area funds quality programs at 144 health and human service agencies in Anoka, Carver, Dakota, Hennepin and Scott counties. These programs have helped our members receive the things they need to get back on their feet: food, clothing, job skills, training and counseling.

In addition, United Way provides leadership to solve community problems by building partnerships between social services, government, business and education to remove barriers and change systems, so people get the help they need. It also works at the grassroots level by focusing funding on strengthening families, nurturing children and youth, supporting older people, increasing self-sufficiency, respecting diversity and ending discrimination, and promoting health and healing. United Way is helping make a real difference in our community.

United Way has supported us, now it's our turn to support them. United Way is the best place to give because:

- United Way is efficient. Over 90 cents from every dollar goes directly to services that help local people when they need it most. Less than 10 percent is used for fund-raising and administrative costs.
- United Way is effective. Sixty-five percent of funding focuses on prevention of problems before they impact people's lives.
- United Way is local. Your contribution goes far, but not far away.
- United Way is accountable. Agency programs are funded only after rigorous review by experienced community volunteers

We believe that through United Way, together we are building a strong community. Show your support by making a generous contribution and by urging your brothers and sisters to give as well. Thank you.

Fraternally,
(Labor leader's name and title)

★ Sample Kick-off Announcement

Dear employee,

Please mark (DATE) on your calendar as the kick-off for (COMPANY'S) annual United Way fund-raising effort. This year's campaign will run from (DATE to DATE) and our campaign coordinator, (NAME), has put together a series of exciting events for us to support and participate in.

(COMPANY NAME) cares deeply about our community and the quality of life that makes our metro area unique. Our support of United Way of Minneapolis Area contributes to this spirit of caring.

Through our contributions, we can make sure help is there for families, co-workers and friends. United Way assures that a broad range of services is available to help local people when they need it most.

I believe that supporting United Way is a sound decision. We will have a chance to learn more about this organization during our kick-off rally.

(COMPANY NAME) is proud to support our local United Way. See you all at the kick-off rally.

Sincerely,
(CEO signature and name)

United Way Campaign

Leadership Letters

★ Sample Retiree Letter

(Be sure to print in larger type)

Dear Retiree,

You and (COMPANY NAME's) retirees continue to be an important part of our organization. We value you for your past achievements and continued loyalty. As a retired employee, I would like to invite you to join us in supporting (COMPANY NAME) United Way campaign, which will take place from (DATE TO DATE) this year.

Through United Way of Minneapolis Area, your gift helps strengthen families, nurture children and youth, support older people, increase self-sufficiency, respect diversity and end discrimination, and promote health and healing.

Minnesota has the enviable reputation of taking care of its residents. This reputation is built on the efforts of people like you who give what they can to maintain an effective network of health and human services. And, United Way is the best place to give because:

- United Way is efficient. Over 90 cents from every dollar goes directly to services that help local people when they need it most. Less than 10 percent is used for fund-raising and administrative costs.
- United Way is effective. Sixty-five percent of funding focuses on prevention of problems before they impact people's lives.
- United Way is local. Your contribution goes far, but not far away.
- United Way is accountable. Agency programs are funded only after rigorous review by experienced community volunteers

As a retiree, you can also give to the community in another way – through your volunteer activities. The Volunteer Resource Center of the Twin Cities, a United Way funded agency, can match your skills, interests, time availability and geographic preference to a volunteer opportunity. Call 612-379-4900 if you want to volunteer to make a difference.

Thank you for your United Way contribution. Together we are building a strong and healthy community for us, and future generations to come.

Sincerely,

(Union member retiree or senior management retiree)

Leadership Letters

★ **Sample Securities Transfer Letter For Those Giving a Stock Gift.**

[Date]

[Name of Donor's Broker]
[Name of Donor's Brokerage Firm Where Securities are Held by Donor]
[Brokerage Firm's Address]

Dear [Broker's Name]:

Please transfer [#] share(s) of [Name and type of security/stock to be gifted]
from my account number [#] to United Way of Minneapolis Area's account at
[Name of brokerage firm], account number [United Way of Minneapolis
Area's brokerage account #.]

If you have any questions about this transaction, please call me at [Donor's
daytime phone number.]

Sincerely,

[Donor's Full Name with Middle Initial]
[Donor's Address]

cc: United Way of Minneapolis Area
Finance Department, Stock Gifts
P.O. Box 64911
166 East Fourth Street
St. Paul, MN 55164-0911
FAX# 651-291-8353

Note to campaign coordinator:
The donor should send the
following letter to their stockbroker
in order to transfer stock gifts to
United Way of Minneapolis Area.
If you have questions regarding
stock transactions, please call the
United Way finance department
at 651-767-3355.

United Way Campaign

web site campaign coordinator Toolkit

United Way of Minneapolis Area now provides tools electronically to work in conjunction with this guide, and provide quick and easy download of a variety of resources helpful in running a successful campaign. The Toolkit, located at www.uwmsp.org/mps/toolkit.htm, contains all of the pieces indicated by a ★ throughout this guide, as well as additional graphics and useful documents for customizing your campaign. To download each piece, just click on the link or thumbnail. Here is a list of what you will find:

Graphics

- Logos – United Way logo in color and black and white, six result areas logos, First Call For Help® logo, Week of Caring logo
- United Way theme tagline
- Drop-in print ads
- Thank you
- Event flyer
- Thermometer

Documents

- Agency list
- Benefit statements
- Fact sheets & sample e-mails
- Success stories
- Sample speeches
- Sample letters – CEO endorsement, retiree, kick-off announcement, stock option, labor support, thank you

In addition you'll find an electronic reporting spreadsheet, an electronic version of this guide in .pdf form, and a great ideas bulletin board area for campaign ideas and tips.

camera-ready
Art



Six Result Areas Logos



United Way Campaign

united way resources and phone Numbers

United Way Resources and Phone Numbers

Campaign Consultants	612-343-6100
Community Education Center	612-340-7623
Agency Speakers	612-340-7587
Agency Tours & Displays	612-340-7642
Videos	612-340-7643
Materials	612-340-7644
Promotional Items	612-340-7644
Week of Caring	612-340-7553
Fundraising	612-340-7400
Leaders in Giving	612-340-7566
Emerging Leaders	612-340-7562
Finance/Stock Questions	651-767-3355
DISCOVERY® program	612-340-7594
First Call For Help®	651-291-0211
Volunteer Resource Center of the Twin Cities	612-379-4900



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