

EMPLOYEE CAMPAIGN MANAGER TRAINING



2010 MANUAL

Employee Campaign Manager Training Manual



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Statement of Purpose

Every community wants a safe place for children to play, and assurance that its most vulnerable residents won't go to bed hungry, cold or without shelter. United Way of Yavapai County helps build a local safety net of core services for children, the disabled, elderly and those experiencing unforeseen hardships in Yavapai County. With your support, and working together with our city, schools, businesses, faith organizations and agencies, we pledge to create the fabric of a healthy livable community.

Why United Way?

United Way of Yavapai County works because it is:

Local

Your donation works here in our communities, making United Way of Yavapai County 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 of Yavapai County is able to maintain a low overhead. United Way of Yavapai County is the most efficient way to help the most people.

Accountable

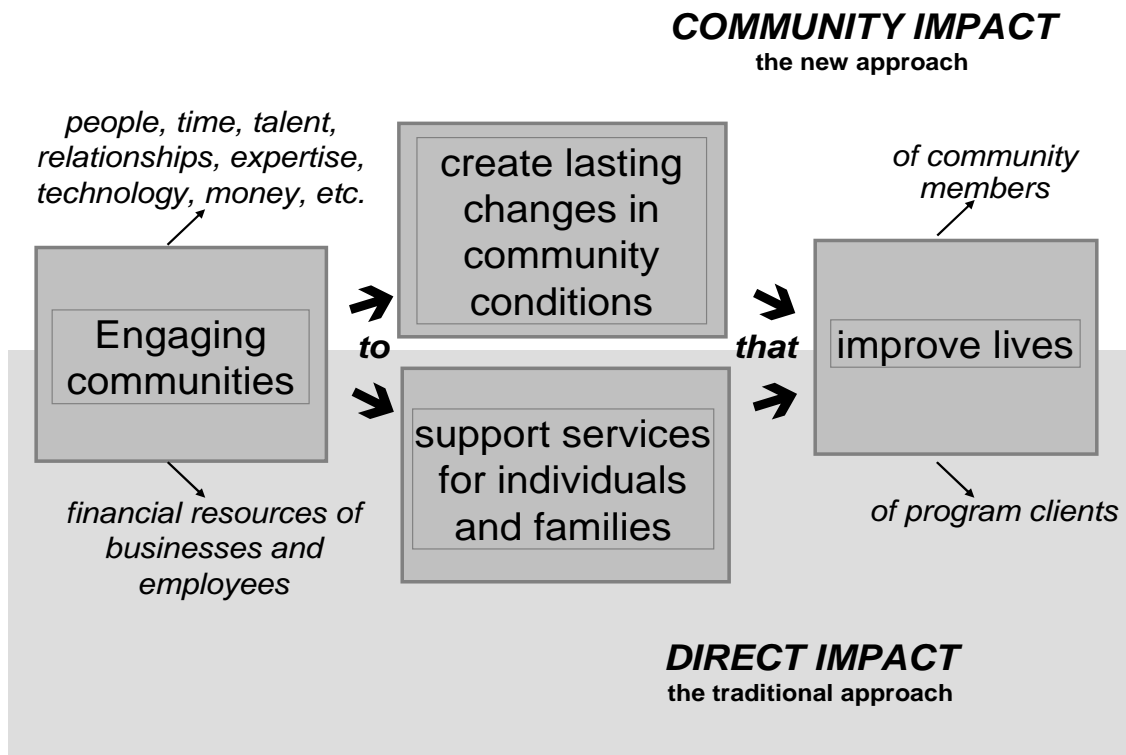
Trained volunteers review agency programs and budgets. United Way of Yavapai County makes sure your gift supports programs that have proven they are making a difference in our communities, making United Way of Yavapai County the smartest way to help the most people.

Expert

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

Community Impact

- ◆ As a Community Impact United Way, we are committed to tackling problems at their core while continuing to invest in meeting immediate needs and on prevention.
- ◆ United Way of Yavapai County is the county's leader in addressing human service needs that make a lasting impact on the lives of our most vulnerable citizens and improving the quality of life for all of us.
- ◆ United Way of Yavapai County is the county's source for solutions, information, policy and research about human services and critical needs in our area.
- ◆ United Way of Yavapai County is a resource to non-profit organizations, government agencies, policy makers, faith-based organizations, foundations, corporations and others concerned with human service issues.
- ◆ United Way of Yavapai County is not a direct service provider even though we provide a county wide information and referral service.
- ◆ The Board and staff actively work to fill the roles of researcher, leader, convener, facilitator, resource developer, change agent, monitor of results and reporter of outcomes.
- ◆ By focusing on core issues, United Way of Yavapai County will lead the way to creating lasting, systemic change in the community.



The 21st Century United Way

Traditional Model	New Model
Fundraiser	Community Impact Leader
Business Relationships	Businesses/Individuals/Partners
Agency Needs	Community Needs
Services Delivered	Measurable Impact/Change
Worthy Causes	Top Human Care Priorities
We Tell The Community	The Community Tells Us

Community Impact:

Community Impact answers the question: "What matters?"

Community Impact is:

Improving lives by mobilizing communities to create sustained changes in community conditions.

Community Impact

When you give to Community Impact, you take advantage of United Way of Yavapai County's greatest strength. Knowledgeable, trained volunteers carefully identify the most critical needs in our community. They distribute funds to the programs and services meeting those needs in our area. ***Community Impact funds are the most effective way for your dollars to make a difference in addressing our community's most pressing needs.***

However, if a donor has a specific interest, we will honor designations to our targeted care areas:

Critical Needs:

Helping individuals & families to become stable and independent

- Support basic survival level programs and services in our local communities.

Successful Lives:

Improving people's ability to become self-sufficient

- Improve access to community resources that reduce barriers and increase independence

Commitment to Learning:

Helping children, youth and adults achieve their potential through education

- Increase quality and affordable learning opportunities to help children succeed in school and adults gain needed jobs skills

Donors can also specify individual United Way partner agencies or certified 501(c)(3) organizations.

How United Way Works

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

Employee Campaign Manager Job Description

Title

Employee Campaign Coordinator (ECM)

Objective

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

Reports to

Company CEO

Responsibilities

- Attends ECM training at United Way of Yavapai County.
- Works closely with your CEO and United Way staff members to develop an effective campaign plan, including dates, goals, etc.
- Recruits and coordinates a team of volunteers to assist you.
- Requests speakers and agency tours from United Way of Yavapai County.
- Coordinates the distribution and collection of campaign materials.
- Coordinates company's or organization's kickoff and recognition events.
- Promotes the campaign throughout the company.
- Encourages leadership giving in the campaign.
- Encourages volunteerism among co-workers.
- Educates co-workers about .United Way of Yavapai County.
- Attends United Way kickoff, report meetings and celebration event (can invite co-workers).
- Invites everyone to give.
- Makes a gift his/herself.
- Makes company campaign fun!
- Completes campaign by giving a final report and pledge forms to the Campaign Executive.
- Thanks donors and volunteers.
- Evaluates and makes recommendations for next year.

Eight Steps to Success

1. Get Started

The earlier you get started organizing your campaign the smoother things will go.

- Attend United Way of Yavapai County Employee Campaign Manager Training.
- Meet your United Way Campaign Executive, Don Shaffer. Call 928-778-6605 for help and assistance.
- Review United Way of Yavapai County materials.
- Visit our website: www.unitedwayyavapai.org. Click on “Campaign Central” to find campaign resource materials”.

2. Know Your Organization

Knowing your organization’s United Way history gives you a place to begin.

- Talk to last year’s Employee Campaign Manager (ECM). Find out what worked and what didn’t work in your organization.
- Work with your CEO to set an aggressive campaign goal based on the number of employees you have and last year’s campaign performance.
- Get a campaign report from United Way of Yavapai County showing past campaign numbers.

3. Enlist Support

This job is much easier and more fun if you have some help. **Don’t try to run your campaign alone!**

- Your CEO’s enthusiasm can be contagious. Ask him or her to write a personal letter of support to all employees. Also get the support of all managers.
- Create a winning team. The ideal team includes respected employees from all departments that can work together.
- Ask your CEO to appoint next year’s Employee Campaign Manager (ECM) to work with you.
- Provide training for your team. Your Campaign Executive can assist you with this.

4. Establish Your Goal

To increase participation

- Schedule United Way presentations during existing staff meetings to educate employees about United Way.

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United Way of Yavapai County

- Ask your CEO to be visibly involved with the campaign.
- Invite United Way and an agency to speak to employees.
- Consider using incentives to encourage pledge form return by a certain date.
- Create a campaign theme and fun events.
- Personalize pledge cards with employee names.

To increase average gift

- Run a separate leadership giving campaign.
- Ask your company to match employee gifts.
- Encourage percentage giving or one hour's pay per month.
- Promote payroll deduction giving.
- Ask for increased giving (either percent or dollar amount increase).

5. Promote Your Campaign

By promoting your campaign, you will be encouraging others to get involved.

- Use United Way of Yavapai County brochures and posters to build awareness of the upcoming campaign. United Way of Yavapai County provides these at no cost to your organization.
- Promote and publicize your campaign in employee newsletters, e-mail and other in-house communication tools.
- Increase employee awareness by creating competition between departments. Prizes and incentives can also create interest.
- Order items from the United Way catalog – pens, t-shirts, etc. depending on your budget.
- Give updates on the campaign process regularly through newsletters, your website, or e-mails.



6. Educate

United Way of Yavapai County has many resources available to help you run an effective campaign. Campaign videos and speakers are excellent ways to show how United Way of Yavapai County dollars are working in our community and can enhance the effectiveness of your campaign meetings. These all help to do the “ask” for you. Our website, www.unitedwayyavapai.org, also provides an abundance of information on United Way of Yavapai County and running a campaign.

Videos

United Way of Yavapai County's campaign video is available and is a great addition to your meeting. Ask your Campaign Executive to provide you with a video or DVD.

Speakers

Agency representatives and United Way of Yavapai County volunteers are able to speak at your organization and are eager to share their stories. A five-minute presentation by one of these speakers will personalize your employee meeting.

Employee Stories

Share stories of how employees, their friends or family members have benefited from United Way.

Don't let things pile up...schedule your speakers early!

7. Implement Your Campaign

Schedule a short, intensive campaign. A two-week campaign has proven to be the most effective. Short campaigns keep the momentum and enthusiasm high.

- ◆ Make a gift yourself. It is easier to ask others when you are giving.
- ◆ Use personalized pledge cards to make sure everyone has an opportunity to contribute. Get help from data processing and department heads.
- ◆ Conduct an employee kickoff celebration.
- ◆ Schedule meetings for employees to hear the United Way message. Arrange for your Campaign Executive to make a short presentation.
- ◆ Use the United Way of Yavapai County campaign video in your meetings to make employees aware of the services provided locally.
- ◆ Make sure every employee is asked to give. Don't forget employees who work off-site, travel extensively, are on alternate shifts or on vacation.

8. Report Results

It is very important to report your results to United Way of Yavapai County as soon as possible following the completion of your campaign. Call your Campaign Executive or United Way of Yavapai County at 928-778-6605 if you have any questions.

- ◆ Make sure all pledge forms are returned and accounted for. Turn all payroll deduction forms in to United Way of Yavapai County or your payroll office.
- ◆ Summarize all campaign information on the Report Envelope. Enclose checks and copies of all pledge forms and designation forms. Please convert cash to a check.
- ◆ Call your Campaign Executive or United Way of Yavapai County to pick up your Report Envelope.
- ◆ If donations are done on-line, or pledge forms are not turned in to United Way of Yavapai County, please provide United Way of Yavapai County with as much campaign information as possible, especially a list of Leadership Givers with their Leadership level.
- ◆ Report the final results to your fellow employees and thank them for participating.

You're Done!

Campaign Ideas & Themes

Themes

A campaign theme is a great, fun way to promote your United Way campaign. Here are some that have been used by different companies:

- ◆ Join the Winning Team
- ◆ Be a Winner...Give to United Way
- ◆ Be Part of the Winning Team...Give to United Way
- ◆ Make Our Community a Winner...Give to United Way
- ◆ Working Together We Make a Winning Team
- ◆ Help United Way Win in Our Community
- ◆ Pitch In & Give...To the United Way Campaign
- ◆ Be a Champion for the United Way Campaign
- ◆ Go for the Gold
- ◆ Catch the Giving Spirit
- ◆ Take Stock in Our Community – What Matters
- ◆ Caring is Our Business
- ◆ Invest in Your Community – Make a Difference
- ◆ United Way Campaign...Something You Can Bank On
- ◆ Make an Impact – Be part of the solution!

Theme Ideas for Your Company

1)	2)
3)	4)
5)	6)

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United Way of Yavapai County

Incentives

Incentives are a highly effective way to promote donating. Here are some of the more successful incentives that have been used by different companies:

Time off from work	Water bottles
Casual days	Duffle bags
Reserved/covered parking	Video rental pass
Tickets to game/movie	Free oil changes
Flowers each month for a year	Grocery certificate
“Sleep-In” pass	Company t-shirt
“Leave Work Early” pass	Dinner for two
Airline tickets	Hotel getaway
Trophy	Gift certificates
Extra half hour for lunch for a week	

Obtaining Incentives

- ◆ You can get most of these items by making a few phone calls or writing a letter. See “Sample Incentive Letter” by going to www.unitedwayyavapai.org and click on “Campaign Central”. Tell the business that you are doing this for your company’s United Way campaign. Most will gladly donate an item. **Do it early!**
- ◆ You can purchase items from the United Way catalog even if you have a small budget. United Way ships directly to you.
- ◆ United Way of Yavapai County will supply you with lapel/sticky pins at no cost.
- ◆ Ask other employees to donate items or services to give away.
- ◆ Find out if your company has a budget to purchase incentives.

How to Use Incentives

The number of ways an incentive can be used is limitless. The important thing is to use incentives as a tool to increase participation or increase the average gift.

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Incentive Ideas

Incentives to Obtain from Another Company			
Incentive	Supplier Name	Address	Telephone
1)			
2)			
3)			

Incentives Which do not Require a Request from Another Company			
1)	3)	5)	7)
2)	4)	6)	8)

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United Way of Yavapai County

Events

Campaign events are great for team building. They're fun, and they help raise awareness and money. Here are some event ideas that have worked well in different companies:

Casual day	Halloween costume contest
Softball/volleyball tournament	Cubical decorating contest
Golf tournament	Chili cook-off
Bake sale	Dress-up day
Executive dunk tank	Departmental penny wars
Silent auction – Items donated by company, vendors or employees	Hallway golf (child size clubs)
Management services auction	Baseball-basketball-football game (executives vs. staff employees)
Auction premier parking space	Paper airplane toss
Sell popcorn and drinks	Spelling bee (associates against managers or administrators)
Invite agency speaker to speak during lunch	United Way trivia contest
Company picnic/employee cook out	Male beauty contest
Ice cream social	Ugly tie/earring contest
Pizza party	Karaoke party (participants pay \$2 to enter)
Pancake breakfast	Book sale (sell employee donated books)
Carnival	
Office Olympics	
Halloween pumpkin carving contest	

Campaign Event Ideas for Your Company

1)	2)
3)	4)
5)	6)



Sample Kickoff Meeting Agenda

• CEO welcomes employees and endorses campaign	2 minutes
• Labor representative (union companies) endorses campaign	2 minutes
• United Way speaker makes presentation	5 minutes
• Show United Way video	5 minutes
• Employee who has benefited from or has toured a United Way agency speakers	2 minutes
• Employee Campaign Manager distributes pledge forms and “asks” for the pledge	2 minutes
• Employee Campaign Manager collects pledge forms and thanks employees	<u>2 minutes</u>
	20 minutes

If you have questions, please call United Way of Yavapai County at 928-778-6605 or email at mikeuwyc@cableone.net

Sample CEO Letters

Dear (EMPLOYEE NAME):

Every community wants a safe place for children to play, and assurance that its most vulnerable residents won't go to bed hungry, cold or without shelter. However, it is easy to feel as if we can't change or control the many problems our community is facing today. Because of that, I want to share an opportunity with you to make a difference by making a donation to United Way of Yavapai County.

United Way of Yavapai County is in the business of creating a meaningful and tangible impact in our community – to bring about change that matters. A donation to United Way of Yavapai County is the most effective and efficient way for you to help people who are truly in need – to provide a local safety net of core services for children, the disabled, elderly, and those experiencing unforeseen hardships.

Please take time to learn more about how United Way of Yavapai County is making our community a better place to live by visiting www.unitedwayyavapai.org and attending our upcoming United Way presentation. With your support, and working together with our city, schools, businesses, and agencies, we can create a healthy, livable community.

Sincerely,

(CEO)

Dear (EMPLOYEE NAME):

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 friends and neighbors who need some assistance.

I want to thank you for your participation in this year's campaign and for showing your support for these 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. Through your generosity, you have made it possible for United Way of Yavapai County to continue to create an impact in our community.

Sincerely,

(CEO)

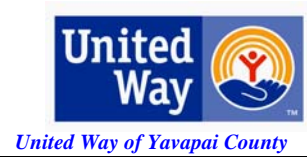
Use this letter after the end of the campaign

Send to anyone who contributed to United Way and to anyone who volunteered time to help organize the campaign.

Use this letter as a warm-up to the campaign

- ◆ Send to employees a week before you begin your meetings.
- ◆ Include as a payroll stuffer a week before you begin your meetings.

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Sample e-mail messages

The following are some suggested e-mail messages you can send to your co-workers at various points in the campaign.

Announce the campaign

TO: All Staff

SUBJECT: United Way of Yavapai County Campaign

How would you like to make a difference in our community?

On (date), we will be kicking off (company name)'s (year) United Way campaign. By giving to United Way, you can change the world, right here at home. Last year, our community raised thousands of dollars to help address some of our community's most pressing problems. This year, we are going to follow that with even more success! This is a great opportunity to get involved and change a life by building the strongest community possible. I will be contacting you soon with more details. Thanks in advance for your participation.

Announce the campaign kickoff

TO: All Staff

SUBJECT: (Company name) (year) United Way kickoff

You are invited to join us for (event name), the kickoff for (company's name)'s (year) United Way campaign.

Date:

Time:

Location:

Don't miss this opportunity to hear how our contributions make it possible for United Way of Yavapai County to help more people in more ways. Hear how United Way of Yavapai County is local, accountable, efficient and expert with our donations. We will get to hear stories of how our donations make a difference in our community. (Name of United Way speaker) will be joining us to share some success stories and explain more about how United Way works. Together we can work to make a stronger community and meet the needs of those less fortunate.

What is Leadership Giving?

Leadership giving is a term United Way of Yavapai County uses for recognizing donors who contribute \$500 or more annually to the campaign. Leadership Givers set the standard for charitable giving, and motivate, by example, those who have the potential to increase their level of commitment. For \$10 a week or more, a donor is listed in the annual leadership giving society directory:

2010 Club

The benefits of being a part of the 2010 Club is that your pledge of \$2,010 will be billed at \$167.50 per month for 12 months starting the first month after you sign up. With your gift of \$2010, you will become a member of our “Leaders In Giving Society” and receive special public recognition and benefits while belonging to a valued group of community leaders.

Star Program

The Star program allows our community retailers to make a significant impact by offering a convenient way for their everyday customers to donate to this worthy cause. Donation amounts begin at \$1.00 and can be any dollar amount the customer chooses to contribute. By simply scanning a bar code, the dollars donated can be easily tracked. The customer is recognized by signing their name on a STAR card that can be placed on your “wall of fame”.

How to conduct a leadership giving campaign

Ask your CEO to serve as the leadership giving chair. He or she should participate at that level of giving. Work with the 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 that level of giving.

Ask the CEO to host a breakfast or other meeting to kick off your leadership giving campaign prior to your employee campaign. Send personal invitations from your CEO to the potential leadership givers. Create an agenda that follows the sample meeting agenda on page 15. However, be sure to include the following:

- ★ CEO explains leadership giving (\$500 and above) and its benefits.
- ★ CEO gives personal endorsement of program and asks employees to consider giving at a leadership level.
- ★ Husband and wife may combine their gifts for recognition.
- ✓ *Follow up with those who were unable to attend.*
- ★ Report the results of the leadership giving campaign to all employees and report all leadership results to United Way of Yavapai County.
- ★ CEO hosts 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

You must 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 the Campaign Executive or United Way of Yavapai County at 928-778-6605 or ask them to visit our web site at www.unitedwayyavapai.org.

Questions & Answers

How much of my money goes to serving those in need?

United Way of Yavapai County and our community take pride in the fact that less than 19 cents of every dollar pledged provides year-round administration. United Way continues to be nationally recognized for its extremely low fund-raising and administration costs.

How can overhead costs be so low?

Several hundred volunteers assist us in helping people in need. Volunteers do everything from helping raise money to deciding where the money will go. Companies volunteer their employees for a period of time to work as Loaned Executives to assist United Way of Yavapai County staff during the campaign. This keeps the campaign costs low so more money can be spent on health and human service needs.

Are all United Ways the same?

There are more than 1,400 local United Ways across the country. Each is independent of all others. All policies for United Way of Yavapai County are set by local volunteers and are not affected or influenced by other local United Ways.

How is United Way of Yavapai County accountable?

United Way of Yavapai County's own operating budget is audited by an independent accounting firm and is carefully scrutinized by a panel of local community volunteers and United Way of Yavapai County's board of directors.

I've never been helped by an agency. Why should I contribute?

While it is true many of the services provided by United Way-funded programs are for the poor, the hungry and those in need, there are agencies that provide other necessary community services. Through the implementation of Community Impact the focus is on programs and services that touch a broad range of our population. There may be some agencies and programs you may not have heard of before. What makes United Way so effective is the clients who are served by some lesser-known programs help prevent them from falling through the cracks.

I don't like one of the agencies in the United Way of Yavapai County package.

All United Way of Yavapai County partner agencies provide valuable services to the community. An agency's affiliation in United Way of Yavapai County is based on programs and services it provides and not its popularity. Trained volunteers visit and evaluate United Way of Yavapai County partner agencies and funds are allocated based on their findings. However, if you feel strongly about a particular Community Impact service area, you may designate your contribution to that area or a certified partner agency of your choice.

Why do some agencies charge fees for their services?

United Way agencies operate without discrimination. Many use a sliding fee scale, where clients pay what they can for the services they receive. By allowing clients to pay for the service, the agencies are able to stretch their United Way dollars to serve more people.

Why doesn't United Way of Yavapai County include all organizations?

First, not all agencies want to be a part of a single, community-wide campaign. Certain organizations have policies against joining local United Way campaigns. Second, United Way standards of financial accountability and program services are high. Some agencies would like to have the United Way of Yavapai County seal of approval but don't quite measure up.

I support a favorite Charity of my own. Why give to United Way of Yavapai County too?

We all have our favorite charities, but the problems of the community are much larger than any one agency can handle. United Way of Yavapai County partner agencies offer a broad mix of programs and services to meet the diverse needs of our total community. The United Way campaign helps keep individual agency fund-raising costs low.

Does United Way money support church-related activities?

United Way of Yavapai County funds agencies covering a wide range of services including some that are affiliated with churches. However, all agencies are funded because they meet a critical community need. United Way of Yavapai County funds only the service programs, not the religious activities, of these agencies. Services by all United Way of Yavapai County agencies are based on need, regardless of age, sex, race or religion.

Who pays for United Way events?

United Way of Yavapai County events are sponsored by civic-minded businesses and organizations that underwrite the costs of United Way of Yavapai County events in addition to their generous support of the United Way of Yavapai County campaign. None of the funds raised in the campaign are used to pay for United Way of Yavapai County events.

Is my contribution used effectively?

Many volunteers visit partner agencies and review their programs each year to make sure your money is being spent wisely.

I am already on a tight budget. How can I afford to give more?

Even a modest pledge per pay period can help provide vital services to local people in need. And by giving through payroll deduction, you can spread your gift over the upcoming year.

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Is my United Way gift tax deductible?

Yes, if you itemize your deductions on your federal tax form. See your accountant for details.

What is the benefit of giving to the *Helping the Working Poor* fund?

United Way of Yavapai County's *Helping the Working Poor* fund invests in programs that assist working poor families improve their overall standard of living. If you itemize your taxes and give to the *Helping the Working Poor* fund, you may be eligible for a state tax credit for up to \$200. In order to take advantage of the state tax credit, you will need to establish your base contribution (the amount you gave to charity in 1996 or later) and then increase your current year donation over your base contribution. This can be accomplished by directing all or a portion of your increased gift (up to \$200) to the *Helping the Working Poor* fund. Please see your accountant for details.

SCRIPT FOR PRESENTATIONS

If you are surrounded by success, it is easier to obtain success yourself. Flourishing communities means a better environment for us to live, work and raise our families. And, a better environment means better results and greater success. That's why we at {*organization*} proudly support United Way of Yavapai County. We know that together we can achieve results right here in Yavapai County...and that creates a stronger community for all of us.

Each of us wants to live in a safe and healthy community. Each of us, likewise, is aware of problems in our community that affect those we care about. As a member of our community, we would like to extend to you the opportunity to make a difference-by starting a workplace campaign in your company for the United Way of Yavapai County.

United Way, through its partner agencies, provides a network of services available to all of us, and it offers an effective and efficient way to give something back to our community. By contributing to United Way, we are given the opportunity to improve the quality of life for every member of our community. Your support of United Way makes it possible to address issues such as helping youth succeed, building strong families, and providing for basic needs. By investing in United Way of Yavapai County, you are helping to build a more caring community for all of us.

Please feel free to contact me at {phone number and/or email address} if you have any questions as well as to arrange meeting date and time. Thank you for considering my request.

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