

2009 CAMPAIGN LEADERS TOOL KIT



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REACH OUT A HAND TO ONE AND INFLUENCE THE CONDITION OF ALL.

LIVE UNITED™

United
Way





Welcome to the 2009 United Way of the Greater Triangle Campaign Team!

Thank you for being a part of the 2009 United Way campaign and accepting the challenge to lead your company's campaign.

In these challenging economic times, we all need to come together to improve the lives of our friends, family, co-workers and neighbors. United Way of the Greater Triangle works to advance the common good in Durham, Johnston, Orange and Wake counties. With a focus on income, health, education and safety, United Way of the Greater Triangle is helping build a stronger and healthier Triangle community.

This year, our main focus is to increase participation in the campaign. Of companies that ran United Way campaigns in 2008, only 19 percent of employees made a gift in support of the campaign. Increasing this level of participation is vital to supporting our community and United Way partner agencies, because employee campaigns account for 75 percent of the total campaign revenue each year.

You can help make a difference in our community:

- **GIVE:** Give United Way the opportunity to hold employee rallies at your office. Give at the level you can afford this year.
- **ADVOCATE:** Tell your co-workers, neighbors and friends about the positive impact United Way and our partner agencies are making in the Triangle.
- **VOLUNTEER:** Coordinate a United Way volunteer project in the community for your company.

This Campaign Toolkit will help you coordinate a successful campaign at your company. In addition to this toolkit, you will also have the support of United Way staff, Campaign Associates and volunteers. You are key to our success and we will be there with you from start to finish. Thank you for Living United and playing such a critical role in this year's campaign!

Sincerely,

John G. Stallings
Region President and CEO, SunTrust Bank
Chairman, 2009 United Way of the Greater Triangle Campaign





Campaign Leader Job Description

Title:	Campaign Leader
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.
Report to:	Your CEO and United Way Representative
Responsibilities:	<ul style="list-style-type: none"> ■ Promote the campaign throughout your company. ■ Provide all employees with the opportunity to donate. ■ Stress the importance of undesignated giving to United Way of the Greater Triangle. ■ Educate yourself and employees about United Way programs and services. ■ Complete documentation and submit to United Way of the Greater Triangle before November 1. ■ Evaluate and make recommendations for next year. ■ Also see Model Campaign on page 6-7.

Online Toolkit

Visit the online toolkit at www.unitedwaytriangle.org/cc/toolkit.asp to get the tools you need to Inform, Engage, Ask and Thank employees who participate in your campaign.



Inform <ul style="list-style-type: none"> ■ Suggested Timetable for Your Company ■ 2009 Message Strategy ■ UWGT Issue Fact Sheets 	Engage <ul style="list-style-type: none"> ■ Speaker & Tour Request Forms ■ Old Reliable Run Posters ■ Volunteer Opportunities
Ask <ul style="list-style-type: none"> ■ 20-Minute Model Presentation ■ CEO Ask Letter ■ Leadership Giver Invitation 	Thanks <ul style="list-style-type: none"> ■ Thank You Poster ■ Thank You Email Template ■ Thank You Event

Additionally, you can:

- Get details on the exciting work United Way of the Greater Triangle is doing in our community.
- Find answers to your employees' frequently asked questions.
- Download sample letters and emails, logos, success stories and templates to personalize your campaign.
- Get additional information on local programs and partner agencies supported by United Way of the Greater Triangle.



United Way of the Greater Triangle Frequently Asked Questions

I used to give to the Community Care Fund, what happened to that?

A. UWGT has retired references to the Community Care Fund. When you choose “LIVE UNITED. GIVE UNITED” on your pledge form or the electronic form, your donation goes directly to United Way of the Greater Triangle to meet the most pressing needs in Durham, Johnston, Orange and Wake counties. You are investing in the building blocks to a better life: Health, Education, Income and Safety.

What guides United Way of the Greater Triangle in making funding decisions?

A. Hundreds of issue experts, agency representatives and community volunteers work together to develop County Action Plans to guide funding decisions. The plans are based on research that shows community strengths and weaknesses so that funding decisions will address the most pressing needs.

How are programs selected to receive funding?

A. United Way volunteers carefully evaluate partner agency programs to identify which programs create the greatest impact on the most pressing needs in the community.

What happened to the six community care areas?

A. UWGT has established a new community investment system for funding that is very responsive to specific needs and priorities in Durham, Johnston, Orange and Wake counties. The system charges a group of community volunteers, experts and agency representatives to make funding decisions at the county level to support programs and services that address the priorities of health, education, income and safety.

What does Give. Advocate. Volunteer mean?

A. These words are a call to action. Each is a way for you to help our community and advance the common good. All of us can reach out a hand to influence the condition of everyone. By volunteering time, donating money or advocating for awareness and support of specific issues or causes, we all can make a difference.

How much of each contribution is spent on administrative costs?

A. Only 14.5 cents out of every dollar pledged to UWGT covers fundraising expenses and other administrative costs. The Better Business Bureau’s Wise Giving Alliance sets the maximum recommended rate for overhead costs at nonprofit organizations at 35 percent.

United Way of the Greater Triangle at a Glance

Mission	To improve lives by mobilizing the caring power of communities.
Vision	All who need help find it.
Jurisdiction	Durham, Johnston, Orange and Wake counties
Jurisdiction Population	1.4 million
Number of Partner Agencies	95
Number of Programs	164
United Way of the Greater Triangle Priorities	Health, Education, Income and Safety
United Way of the Greater Triangle Regional Initiatives	Financial Stability and Ending Homelessness
United Way of the Greater Triangle Direct Services	Teaming for Technology, United Way 2-1-1 and Volunteer Solutions



Key Messages

Use these key messages to help develop materials and speeches for your campaign.

Advancing the Common Good

United Way is working to advance the common good by focusing on education, income, health and safety. These are the basic things we all need to build a solid foundation for a good life.

Education, Health, Income, Safety

Over the next year, and in the years to come, these four words will change lives and transform our community. When we as a community choose to GIVE, ADVOCATE and VOLUNTEER, we influence the condition of us all by making our community a better place to live.

GIVE

When you give, you lend a hand to your neighbors in need. More families are fed. More seniors receive the prescriptions they need. Your investment in United Way of the Greater Triangle supports the most pressing needs in Durham, Johnston, Orange and Wake counties.

ADVOCATE

When you advocate, you lend your voice to those who are unable to speak for themselves. You speak for the elderly who desperately need a warm and caring home during their later years. You give a voice to a child who has been victimized and abused.

VOLUNTEER

When you volunteer, you lend your muscle and talent to better our community. Volunteers give their time to renovate homes or to mentor a child.

How I Live United Campaign

As your company embarks on the 2009 United Way of the Greater Triangle Campaign, we encourage you to incorporate Live United.

- Use the templates in the campaign toolkit to personalize your Live United campaign. Create posters featuring your CEO and other staff members in Live United t-shirts. See poster samples in online toolkit.
- Ask employees how they Live United. Feature the most interesting answers on your personalized posters, share via emails or in company newsletters.
- Order Live United t-shirts to give away as prizes or to those who attend volunteer events. Order at www.unitedwaystore.com
- Create posters to answer what your company is doing in the community to Live United.
- Submit your poster designs to ejeffords@unitedwaytriangle.org to have them featured on the United Way of the Greater Triangle homepage.





The Model Campaign

9 Steps to Campaign Success

1. Get Leadership Involved

Your CEO or organization leader is critical to the success of your campaign. His/Her support and enthusiasm can be contagious. Encourage that person to:

- Endorse the campaign in a letter to all employees thanking them for past support and urging their continued support.
- Participate in employee meetings.
- Signoff on goals and incentives.

2. Recruit Help

Recruiting help will make your job easier and more fun.

- Recruit a campaign team with representatives from all employee levels and departments.
- Communicate regularly. Set your campaign calendar in advance so your team can set its schedules.
- Ask the CEO or organization leader to appoint next year's Campaign Leader now so he/she can serve on the team.
- Include your United Way representative as a part of your campaign team.

3. Develop a Plan and Set a Goal

Good planning is vital to your campaign's success and ensures efficient use of your time and resources.

- Meet with your United Way representative to discuss ideas.
- Attend a United Way Campaign Leader Training.
- Plan a campaign that fits your company culture.
- Pick a theme and timetable for campaign activities.
- Set a goal for this year's campaign. Target areas within your company to increase participation and average gift.
- Determine a method for distribution, completion and return of pledge forms. Return results to United Way by November 1.
- Plan a kickoff event.
- Plan promotions, incentives and special events.
- Attend United Way's kickoff event in September.
- Select a method for reporting the results by November 1 and thanking the employees.
- Outline your objectives and present them to your CEO and management group.
- Develop plan for promoting the campaign (see step 5).

4. Coordinate a Leadership Giving Campaign

Coordinate a special solicitation for your top management, previous leadership givers and prospects to ensure success and enhance the performance of your campaign.

- Ask your CEO to host a short meeting/event to encourage leadership giving.
- Send invitations to targeted individuals from your CEO.
- Work with your United Way representative to outline an agenda and arrange for a speaker.

5. Promote the Campaign

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

- Use United Way brochures, posters and other campaign materials to build awareness of the upcoming campaign.
- Promote and publicize your campaign in employee newsletters, email, intranet and other company communication tools.
- Use campaign videos, speakers and tours to show employees how United Way dollars are working in our community and to enhance the effectiveness of your campaign.
- Increase employee awareness through special events, incentives and educational events.

6. Ask for the Gift!

There are several effective ways to ask your employees to pledge to United Way. Determine which would work best in your company or use a combination. Whichever method you choose, be sure to include all of these elements outlined in the 20-minute Presentation Package (See separate section for other alternatives).

Group Meeting Solicitation: Employees are brought together to hear the United Way message and are then asked to fill out their pledge cards at the end of the presentation. Determine ahead of time who in your company will make the ask at the meeting.

Peer-to-Peer Individual Solicitation: Use this one-on-one ask when group meetings are not possible.

Both: Hold one group meeting or a series of group meetings and use the one-on-one solicitation as a means of follow-up for those who couldn't attend a group session.

100% Ask: Provide every employee with the opportunity to make a gift.



20-minute Model Presentation Package		Alternative Presentation Formats			
Opening remarks by Campaign Leader	1 min.	X	X	X	X
Endorsement by CEO (or organization leader)	1 min.	X			
Speaker (United Way partner agency representative, volunteer, board member or employee)	5 mins.	X	X		
United Way overview by United Way Representative <ul style="list-style-type: none"> ■ How United Way addresses community needs ■ United Way priorities ■ The results your gift creates ■ Why give to the United Way? 	5 mins.	X	X	X	X
Campaign Video	5 mins.	X		X	
Ask for the gift (company representative)	2 mins.	X	X	X	X
Thank you and closing comments (Campaign Leader)	1 min.	X	X	X	X
Collect pledge cards					
Total Time	20 mins.	20	14	14	9

Suggested Giving Guide

If you make:

Up to \$25,000

\$25,001 - \$50,000

More than \$50,000

Your suggested gift is:

0.6% of your annual salary*

1% of your annual salary

2% of your annual salary

* If you give at the suggested rate, you will give approximately one hour's wage per month.

7. Follow-up and Report Results by November 1

Follow up with donors and your team. Report results to United Way as soon as possible after the campaign.

- Make sure all donors have kept a copy of their pledge card. Starting in 2007, all donors must have a copy of their pledge form (or online pledge confirmation) along with their cancelled check or paystub to satisfy the IRS regulations regarding charitable gifts. For a single one-time donation of \$250 or more, United Way of the Greater Triangle will send the donor a charitable contribution receipt.
- Follow-up on any outstanding pledge cards and employees who missed the meeting.
- Follow-up with committee assignments to offer help and ensure deadlines are met.
- Work with your United Way representative to ensure all campaign documents are filled out properly.
- Return cash, checks and campaign information to United Way in your signed report envelope.
- Turn in all campaign reports to United Way by November 1.

8. Thank your Employees

When you show appreciation for their gifts, your employees will realize how important their contributions are and will be more inclined to continue giving.

- Report results to employees.
- Acknowledge their generosity through innovative ways of saying thank you.
- Have the CEO host a thank you/recognition event for leadership givers.
- Show employees the impact of their contributions in the community. Your United Way representative can help.

9. Stay Involved

Participate in United Way's events held throughout the year.

- Encourage employees to visit Volunteer Solutions to find service projects at www.unitedwaytriangle.org/volunteer.
- Sign up to receive United Way of the Greater Triangle's newsletter.
- Educate employees about United Way, partner agencies and the impact of their contributions.



Campaign Materials

Use United Way campaign materials to build awareness. Below are brief descriptions of materials available for use in your campaign and suggestions for how to use the materials.

Posters - Posters give a face to the campaign by showing what others are doing to Live United.

Poster Templates - Download these templates to personalize your campaign by featuring fellow employees and company leadership.

Table tents - Table tents show how your gift creates lasting change in our community and serve as subtle reminders of the campaign. Display in break rooms, cafeterias and other places where employees congregate and have time to read the information.

Live United Newsletter - Live United is a good source of information about United Way of the Greater Triangle during the campaign season and beyond. Ask your United Way Representative how you can get your company's innovative campaign recognized. Sign up at www.unitedwaytriangle.org to receive Live United.

Goal Poster - Keep employees aware of the status of the campaign. Post goal posters around the office during the campaign. It reminds employees of the campaign and may spur some to action.

Campaign Videos - Campaign videos and PSAs showcase the power of your gift. Show them at your employee meeting, post on your company's intranet or view on United Way's website.

CEO Letter - Attach to materials or send it out to company employees to kickoff campaign.

Thank You Letter - Thanking donors makes them more likely to give again and recommend United Way to a friend.

Spanish Language Materials - Posters and brochures are also available in Spanish.

United Way of the Greater Triangle Success Stories - Share these stories with your employees as part of your newsletter to show how their United Way contribution makes a difference.

Old Reliable Run 10k & 5k Run/Walk Team Poster - Organize a team to participate in the 26th Annual Old Reliable Run 10k and 5k Run/Walk to benefit United Way of the Greater Triangle on Sunday, Nov. 15. Use the online Team Raiser feature that allows walkers and runners to create webpages to help raise money. Register at www.oldreliablerun.com

Contributor's Guide - This is your one-stop piece for all you want to know and share about United Way of the Greater Triangle.





Ways to Increase Participation

- Emphasize that UW helps family/friends/co-workers who have fallen on hard times.
- Award a “jeans day” pass when people make a payroll deduction gift (at “fair share” level). When clients ask, say “in support of UW”.
- Stress giving back to the community that supports you (Particularly effective in the public service and education fields).
- Provide special incentives or recognition for first-time donors, such as a personalized thank you from local CEO or a corporate match for new donors.
- Encourage 100% of employees to login to pledge site/fill out paper form “pledging decision,” with incentives for anyone who “participates.”
- Expose employees to agencies (speakers, tours, reason why they should give to United Way).
- Arrange for a “testimonial” from an employee who has received services from a UW agency to put a face to United Way.
- Have campaign appeal come from someone other than senior leader – from co-worker instead.
- Provide a drink/snack from cafeteria for everyone who turns in a pledge form (\$ gift or not). Everyone gets something.
- Provide a special treat to each department with 100% pledge card turn-in.
- Provide pledge forms for employees to complete at agency fairs.
- Set up eWay recognition program (e.g. prize raffle for gifts by a certain date).
- Have early bird raffle drawing for pledge cards turned in on the first day of campaign.
- Start a “viral” email that employees can pass on to their coworkers.
- Provide compelling message (stories, video, speaker, etc) to share the success of United Way.
- Set up interdepartmental contest for highest % participation.
- Provide more volunteer opportunities for employees to help them better understand the needs in our community.
- Provide sticker to each employee who turned in a pledge form (e.g. “I gave to United Way Today”).
- Design customized campaign posters showing company employee.

Incentives

Incentives can increase participation or increase the average gift of your employees. Distribute a schedule of incentives and how they will be awarded (e.g. first time contributor, top performing department, and largest gift increase).

- Time off
- Casual Day
- Catered Breakfast by Senior Management
- Reserved/Covered Parking
- Tickets to Games/Movies
- Company shirts
- Dinner for Two
- Gift Card
- Hotel Getaways
- Airline Tickets





Fun Campaign Ideas and Events

Holding a special event as part of your company's campaign raises additional money for United Way while having fun. Check www.unitedwaytriangle.org/cc/toolkit.asp for more ideas.

- **Host a Game Show** - Highlight knowledge of United Way and agencies using game show formats (Jeopardy, Wheel of Fortune, etc.)
- **Sponsor a Team in the 26th Annual Old Reliable Run 10k & 5k Run/Walk** - Design your own t-shirts and challenge departments to recruit the largest number of participants for the race. Team participation helps reach new contributors, employee family members and increase your campaign results. Use the Team Raiser to create webpages to help raise money. www.oldreliablerun.com
- **Sing-a-gram** - Have campaign committee go around and sing songs to unsuspecting coworkers that have been sent a sing-a-gram.
- **United Way Carnival** - Have carnival games and food for employees to enjoy (bean bag toss, three-legged races, pie in the face, executive dunk tank, etc.).
- **United Way Trivia Contest** - Get your questions from United Way fact sheets and other materials and offer a prize to the person who gets the most questions correct. The quiz can be distributed via voicemail or email.
- **Lights! Camera! Action!** - Have employees dress up as their favorite characters from movies or TV shows. Act out a plot that involves United Way. Raffle off movie tickets, TVs and video gift certificates.
- **Tune in for United Way** - Hold a karaoke kickoff party. Raffle off stereos or CDs. Organize a sock hop. Hold a musical talent show.
- **United Way Jingle Contest** - Employees write jingles for United Way. Charge an entry fee or vote with money.

Educational Events

The United Way Campaign is a great opportunity to educate your workplace about services in our community. Here are some suggestions for easy ways to effectively educate employees.

- Ask employees who have benefited from United Way funded services to speak at employee meetings, or feature their stories in company newsletters.
- Publish a special issue of the company newsletter or campaign newsletter entitled "How I Live United" to highlight how employees are giving, advocating and volunteering. Also include stories of employees helped by United Way, and key campaign dates and events.
- Show the campaign video and PSAs continually in lunch rooms or break rooms where appropriate.
- Request a speaker from the **United Way of the Greater Triangle Speaker's Bureau** to speak at an event. Complete the request at least three weeks in advance.
- Use email and/or voicemail to send campaign messages and daily facts.
- Participate in **the United Way of the Greater Triangle Campaign Kickoff** on September 6, 2009.
- Find volunteer opportunities using **Volunteer Solutions** to engage your employees. Have employees share their experience on How I Live United posters or emails you share with other employees. www.unitedwaytriangle.org/volunteer.
- Take employees on a **Live United Tour** to get an up close and personal view of contributions at work and how agencies work together to create a strong safety net for the community. Have employees complete "How I Live United" forms to capture their feelings on the impact they are making with their gifts and how they plan to Live United now and in the future.
- Host an **Electronic Agency Fair** - select several partner agencies to highlight and get select questions that can be answered from the agencies website. Award points for correct answers and award prizes at the end of the week.

Strategies to Increase the Average Gift

- Use the eWay pledging system. It makes giving easy, fast and private. It eliminates paperwork, provides real-time results and can be customized to fit your company. Talk to your United Way representative for more information.
- Give the employees extra time off for increasing their gift by 10 percent.
- Hold a leadership giving campaign.
- Stress the ease of payroll deduction. Offer extra incentives for those who give that way.
- Ask employees to give \$1 more a week.



Suggested Campaign Timetable for Your Company

5-8 Weeks Before kickoff

- Establish a campaign committee.
- Attend Campaign Leader training with your campaign committee.
- Review/analyze last year's campaign.
- Meet with United Way representative.
- Meet with CEO and obtain support of campaign.

6 Weeks Before kickoff

- Conduct meeting of campaign committee to set goals, establish campaign timeline, plan events and develop a leadership giving campaign.
- Secure incentives and prizes.
- Develop publicity and education plans.

3-4 Weeks Before kickoff

- Personalize pledge forms (name and last year's pledge).
- Train campaign committee members.
- Confirm all meeting arrangements with department heads and United Way staff.
- Schedule speakers from United Way Speakers Bureau.
- Request campaign supplies (brochures, posters, etc.).

1-2 Weeks Before kickoff

- Begin campaign promotion.
- Send CEO letter to all employees.
- Hold your leadership meeting/event for management.

Day of kickoff

- Make sure all equipment is working.
- Use 20-minute presentation package (see page 7)
- Distribute pledge forms and other materials.
- Ask for contributions. Collect pledge forms and say "thank you."

During Your Campaign

- Continue follow-up with each employee - 100 percent ASK!
- Report progress to employees.
- Give away prizes and incentives.
- Publicize results of leadership campaign.

Campaign Wrap-up

- Follow-up on outstanding pledges.
- Submit final United Way campaign report to United Way office.
- Meet with CEO and report results.
- Announce final results to employees.
- Thank and recognize contributors.
- Conduct final meeting with campaign committee.
- Prepare written evaluation and recommendations for next year's Campaign Leader.

2009 United Way of the Greater Triangle Campaign

Campaign Chair: John Stallings, Region President and CEO, SunTrust Bank, Inc.
Theme: Live United. Give United.

I don't just wear the shirt, I LIVE IT.

Campaign Dates

- Campaign Leaders Training - Experienced Campaign Leaders: July 28, September 10
NEW Campaign Leaders: July 30, August 19, August 27, September 9

- Live United Campaign Kickoff- September 6, 2009

- Deadline to report company results to United Way of the Greater Triangle- Nov.1, 2009

- Application Deadline for Chairman's Awards- Wednesday, Dec. 9, 2009

Volunteer Dates

- Project Homeless Connect- Thursday, October 8, 2009

- Harvest Feast (Volunteer Opportunity) - Saturday, December 7, 2009

- 26th Annual Old Reliable Run 10K & 5K Run/Walk - Sunday, Nov. 15, 2009

- 5th Annual Triangle Martin Luther King, Jr. Day of Service - Monday, Jan. 18, 2010

Important Contacts

- United Way of the Greater Triangle: (919) 460-8687

- Speakers Bureau Coordinator: (919) 460-1875

- Campaign Associate _____ Phone Number _____

- Relationship Manager _____ Phone Number _____

Our Vision: All who need help find it.

Our Mission: To improve lives by mobilizing the caring power of communities.

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