



**WELCOME TO THE  
UNITED WAY TEAM!**

**LIVE UNITED**

2017 Campaign Coordinator Guide



United Way  
of Southwest Alabama

# CAMPAIGN COORDINATORS ARE AMBASSADORS, ORGANIZERS, MOTIVATORS, & STORYTELLERS

As your organization's campaign leader, you will educate and inspire others about the work of United Way and help them understand how their contributions help United Way improve lives and our community.

You enable coworkers to invest in what matters by planning, organizing, and coordinating a successful United Way campaign within your company.

## WHAT DO WE DO?

### **Mission**

To improve the quality of life in the community

### **Vision**

The United Way of Southwest Alabama will strengthen communities by focusing on uniting and mobilizing resources that support the building blocks for a better life: Education, Financial Stability, Health, and Essentials

### **Credo**

United Way of Southwest Alabama fights for the health, education, financial stability, and access to life's basic essentials for every person in every community we serve.

But we are more than the fund-raisers. We are hand-raisers. We raise our hands not only to lead the fight, but to reach out to people who need help. And hope.

We win when we Live United. By forging unlikely partnerships. By finding new solutions to old problems. By mobilizing the best resources. And by inspiring individuals to join the fight against our community's most critical needs.

So who are the hand-raisers, the game-changers? They're people who know that at the core of every human being is a desire to do good. Who recognize the power that comes from a shared purpose. Who understand they're always stronger together than they are alone.

**In Southwest Alabama, it means people like you.**

United Way of Southwest Alabama needs you to join the fight. Because your passion, expertise, and resources will help the fight become a win. A win that's not just a short-term contribution, but a long-term solution.

We are part of a network of 1,800 United Ways in 41 countries and territories. But the place that needs you most is right here, in Southwest Alabama.

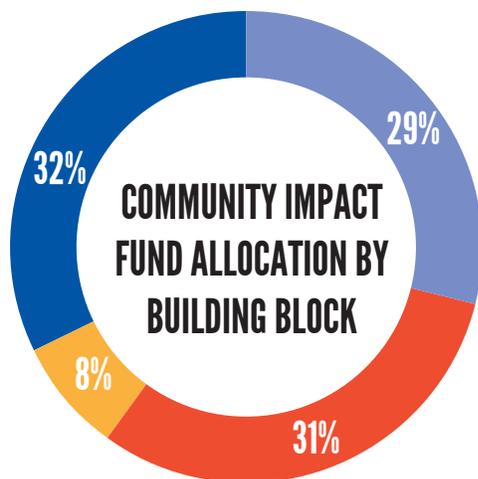
So raise your hand if you're ready to be that game-changer. Because United we fight, United we win. We have one life. To live better, we must Live United.

# PARTNER AGENCIES

AIDS Alabama  
 Alpha Women's Resource Center  
 AltaPointe Health Systems  
 American Red Cross South Alabama Chapter  
 The Arc of Clarke County  
 Big Brothers Big Sisters of South Alabama  
 Boys & Girls Clubs of South Alabama  
 Boys & Girls Club of Southwest Alabama (Thomasville)  
 Catholic Social Services of the Greater Mobile Area  
 The Child Advocacy Center  
 Child Day Care Association  
 Community Action Agency of South Alabama  
 Court Appointed Special Advocate (CASA) Mobile  
 Crittenton Youth Services  
 Dearborn YMCA  
 Drug Education Council  
 Dumas Wesley Community Center  
 Educational Center for Independence (ECI)  
 Epilepsy Foundation of Alabama  
 Family Promise of Coastal Alabama  
 Feeding the Gulf Coast  
 Franklin Primary Health Center  
 Goodwill Easter Seals of the Gulf Coast  
 Gulf Regional Early Childhood Services  
 Home of Grace for Women  
 Housing First  
 Imagination Library of Choctaw County  
 Imagination Library of Mobile County

The Learning Tree, Inc.  
 Lifelines Counseling Services  
 McKemie Place  
 Mobile Arc  
 Mobile Area Education Foundation  
 Mobile Community Action  
 Mulherin Custodial Home  
 Ozanam Charitable Pharmacy  
 Penelope House, Inc.  
 Regional Child Advocacy Center (Clarke County)  
 Ronald McDonald House Charities of Mobile  
 The Salvation Army of Coastal Alabama  
 Sickle Cell Disease Association of America, Mobile Chapter  
 South Alabama Volunteer Lawyers Program  
 Southwest Alabama Retired & Senior Volunteer Program (RSVP)  
 (Thomasville)  
 St. Mary's Home  
 United Cerebral Palsy of Mobile  
 United Way 2-1-1  
 United Way of Baldwin County  
 United Way Volunteer Connect  
 Via Health, Fitness, & Enrichment Center  
 Victory Health Partners  
 Volunteers of America Southeast (VOASE)  
 Volunteer Income Tax Assistance (VITA)  
 Wilmer Hall Children's Home  
 YMCA of South Alabama

# COMMUNITY INVESTMENT



## HEALTH

*Good health is the foundation for being a productive citizen with a better quality of life*

## EDUCATION

*A strong educational foundation enables students to reach their full potential*

## FINANCIAL STABILITY

*Individuals can achieve economic self-sufficiency when empowered with the right resources, skills, and tools*

## ESSENTIALS

*Individuals cannot succeed without life's basic essentials*

*During 2016 and again in 2017, UWSWA will be investing in 101 programs, run by 44 Partner Agencies. Within Clarke, Mobile, and Washington counties, \$634,500.00 will be invested in education, \$669,707.73 in health, \$175,500.00 in financial stability, and \$701,016.68 in essentials.*

*In addition to the funds that are allocated through the Community Impact process, UWSWA invests in and its donors designate approximately \$2.5M each year to local programs, services, and Partner Agencies throughout Southwest Alabama.*

# WHY UNITED WAY?

In every corner of our community, for families large and small, neighbors young and old, for anyone searching for help, hope, and a better life, United Way of Southwest Alabama is here.

UWSWA touches the lives of thousands of our neighbors, in all stages of life, keeping our community's safety net strong while creating long-lasting, positive change in key areas:

## HEALTH

United Way is building healthier, more resilient communities by promoting healthy eating and physical activity, expanding access to quality health care, and integrating health into early childhood development. By creating solutions that help everyone thrive, we create healthier communities that improve our collective quality of life.

Health Priorities:

- Promoting healthy behaviors
- Access to quality healthcare and prescription drugs
- Access to addiction, behavioral, and mental health counseling

*Since 2006, individuals in Southwest Alabama have saved more than \$2.8 million using the FamilyWise Prescription Savings Card*

## FINANCIAL STABILITY

United Way, working with partners from all sectors of society, connects people to the resources they need to get on more solid financial ground. When people are able to find decent jobs, provide for their families and save for the future, they and their children are more likely to enjoy healthy lives and succeed in school. The result is thriving communities where everyone has more opportunity to succeed.

Financial Stability Priorities

- Workforce development
- Financial literacy and planning
- Non-emergency income support

*During the 2016 tax season, the SAFE Coalition filed 3,225 tax returns, which resulted in more than \$3.6 million returned to the community through tax refunds and tax credits*

## EDUCATION

United Way adopts a comprehensive approach to education that spans all the way from cradle to career and beyond. By supporting programs that provide quality education for students of all ages, we are investing in brighter, more secure futures for individuals and families living in Southwest Alabama.

Education Priorities:

- Kindergarten readiness
- Reading and math proficiency
- High school graduation
- College and career readiness

*Last year, 585 children under the age of 5 in Mobile County together received 5,373 free books through the Dolly Parton Imagination Library program*

## ESSENTIALS

United Way knows that individuals cannot succeed without life's basic essentials. Research shows that the most basic needs must be met before individuals and families can tackle other life changes. To strengthen our community, United Way of Southwest Alabama aspires to ensure that our citizens' immediate and basic needs are met during times of crisis and personal challenge.

Essentials Priorities

- Food
- Shelter
- Emergency financial assistance
- Disaster Relief and recovery

*In 2016, United Way 2-1-1 Help Line answered 97,637 calls and provided 140,101 referrals in Alabama*



# KEY INITIATIVES

## DOLLY PARTON'S IMAGINATION LIBRARY

Each month after a child is registered—up until their 5th birthday— Dolly Parton's Imagination Library sends an age-appropriate book to the child's home at no cost to the family.

Currently, children who live in Mobile County zip codes 36509, 36582, 36587, 36605, 36610, 36615, or 36617 are eligible.

## FAMILYWISE PRESCRIPTION SAVINGS CARDS

In partnership with FamilyWize, UWSWA distributes prescription drug cards that provide savings for individuals who do not have insurance or need medications that are not covered by insurance.

## FREE TAX PREPARATION

Through the VITA program, UWSWA provides communities with free federal & state e-filing assistance. UWSWA recruits & trains volunteers to assist individuals with tax preparation & to educate taxpayers about the Earned Income Tax Credit (EITC) & other tax credits and filing options.

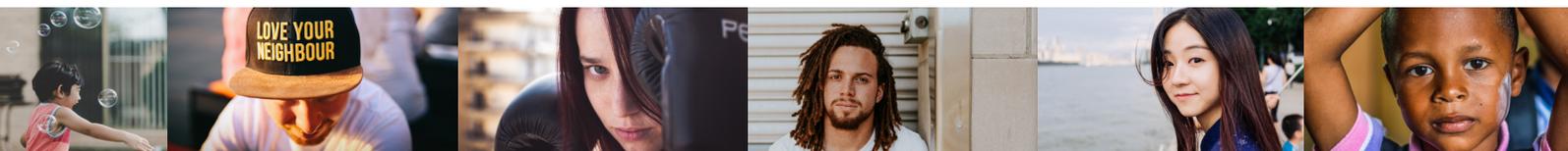
During the 2016 tax season, the SAFE Coalition filed 3,225 tax returns, which resulted in more than \$3.6 million returned to the community through tax refunds and tax credits.

## UNITED WAY 2-1-1

Through a UWSWA partnership with Lifelines Counseling Services, trained specialists provide individuals seeking assistance free & confidential referrals to community services.

## VOLUNTEER CONNECT

United Way Volunteer Connect is a recruitment & management website that increases volunteerism & mobilizes resources by offering opportunities for individual & groups to volunteer. It includes an online project calendar & the ability to track volunteers & hours.



# YOUR ROLE AS A CAMPAIGN COORDINATOR

At United Way, we believe that each campaign should be tailored to fit your organizational culture to enable your co-workers to participate in improving the quality of life in your community by planning, organizing and coordinating a successful United Way campaign within your company. Keep in mind that your United Way Staff Partner will work with you every step of the way.

## Key Responsibilities:

- Participate in a United Way Coordinator training.
- Work closely with your CEO, United Way volunteers and staff members.
- Develop an effective campaign plan including dates, goals, etc.
- Develop goals and benchmarks.
- Recruit a team of volunteers to assist you.
- Arrange campaign meetings.
- Monitor and provide information to United Way staff partner.
- Request speakers from United Way.
- Coordinate the distribution and collection of campaign materials.
- Coordinate your company's kick-off and recognition events.
- Promote the campaign throughout your company.
- Encourage leadership giving in your campaign.
- Encourage giving of time, talent, and resources among your co-workers.
- Invite everyone to give. Set an example by making a gift yourself.
- Make your company campaign fun!
- Complete your final report and send it with pledge forms to United Way.
- Thank your donors and volunteers.
- Evaluate and make recommendations for next year.

## FIVE STEPS TO RUNNING A SUCCESSFUL CAMPAIGN

### 1. ENERGIZE

Recruit a strong team to lead your United Way campaign

### 2. INSPIRE

Share the United Way story with all employees

### 3. ENGAGE

Connect employees to our work and show them how they can do something about it

### 4. ASK

Ask everyone to give

### 5. THANK

Thank everyone for giving

# 1. ENERGIZE

## ENERGIZE YOUR CAMPAIGN BY:

- Learning about the work of United Way
- Recruiting a team for your company's campaign

### **Build a team of enthusiastic volunteers**

Involve them in planning a strategy and setting a goal that fits your company's size and culture

### **Establish support from the top**

Get your CEO actively involved in all aspects of your campaign through events and communications

### **Enlist a Leadership Giving Chair**

Leadership giving is the foundation of every successful campaign

### **Recruit a Labor Union Representative (If Applicable)**

Who will lead and support your activities among union members

### **Identify employees who are energetic and have a variety of skills to serve on the campaign steering committee**

Recruit campaigners to connect one-on-one with employees. The ideal ratio is one campaigner for every 10 employees

- Setting your strategy and goals

**Develop a campaign strategy that fits your company's size and culture, engaging everyone at all levels**

### **Set a campaign goal**

Consider prior year results, number of employees, and current business climate.

**Visibly track results throughout the campaign**

## CONSIDER THESE OBJECTIVES THAT WILL BOOST OVERALL RESULTS:

- Increasing employee participation
- Increasing donations through payroll deduction
- Asking employees to increase their gifts from last year
- Increasing leadership giving



## 2. INSPIRE

### **SHARE THE UNITED WAY STORY**

- Share videos and stories featuring those impacted by United Way.
- Make plans to send a series of emails to employees to keep everyone informed of the good work that United Way does in the community as well as your campaign progress
- Include information about United Way in your company newsletter, intranet, or other internal communication channels
- Place United Way brochures in key meeting areas and break rooms

### **HARNESS THE POWER OF PERSONAL TESTIMONIES:**

- Ask a colleague who has benefited from United Way to share his/her experience
- Show the United Way video that demonstrates how United Way changes lives

### **INVITE EMPLOYEES TO SEE UNITED WAY'S WORK IN ACTION:**

- Set up community impact tours for employees to see first-hand their dollars at work

## 3. ENGAGE

### **CONNECT EMPLOYEES TO THE WORK OF UNITED WAY & HOW THEY CAN DO SOMETHING ABOUT IT**

- Attend and invite your colleagues to attend the United Way Campaign Kick-Off
- Participate in a United Way partner agency tour
- Hold a company-wide kick-off at the beginning of your campaign
- Use special events and fun activities to add an additional spark to your campaign
- Find ways to incorporate United Way in to already planned meetings and events
- Encourage those under 40 to help our community and network as members of Emerging Leaders

### **GIVE EMPLOYEES AN OPPORTUNITY TO DO MORE THROUGH LEADERSHIP GIVING**

- Share the impact and benefits of leadership giving at management and employee meetings
- Promote the Women United initiative among existing women's groups and female employees

### **PARTICIPATE IN A UNITED WAY DAY OF CARING**

- Each year, hundreds of volunteers come together to make a lasting difference in our community through United Way Day of Caring projects. This is a great opportunity for team-building and enables volunteers to have a hands-on impact in the community.
- Each year, volunteers spend one day at United Way partner agencies, meeting their needs by completing projects the agencies haven't had the time, money, or staff to address.
- Get your team personally involved in United Way's work by scheduling a United Way Day of Caring project any time of the year!

# 4. ASK

## HOW TO ASK

- Ask people one-on-one to support United Way through your company campaign
- Use campaign events and staff meetings to educate employees about United Way's work and ask them to help make that work possible
- Ask your company leadership to attend meetings or events, publicly endorse the campaign, and encourage employees to do so as well
- Invite United Way representatives to speak with your employees during a meeting or event

## HOW TO GIVE:

- Payroll deduction (the easiest way to give)
- Credit Cards
- Stock Donation
- Cash/Check
- Direct Billing

## 20 MINUTE CAMPAIGN KICK-OFF AGENDA

### 3 MINUTES - WELCOME

Campaign Coordinator, CEO, or Committee Member welcomes employees and explains the purpose of and how the company will support the campaign

### 2 MINUTES - ENDORSEMENT

Company CEO or Labor Leader (if applicable) provides statements of support. This establishes a corporate and labor commitment to United Way and encourages company-wide participation

### 3 MINUTES - UNITED WAY MESSAGE

United Way Volunteer or Staff provides an overview of United Way and the impact of its services. This informs the audience of the needs in our community and offers them the opportunity to participate in addressing those needs

### 5 MINUTES - AGENCY SPEAKER

A speaker from a United Way agency illustrates how employee contributions are making the difference in our community.

### 5 MINUTES - SOLICITATION

The number one reason people do not give is because they are not asked. Make it a priority to educate and provide the opportunity for every employee to give.

### 2 MINUTES - CLOSING REMARKS

Campaign Coordinator:

- Describes incentives
- Talks about Leadership Giving Program
- Answers questions
- Asks employees to complete pledge forms
- Collects ledge forms
- Thanks everyone

# 5. THANK

### SAY IT

Through their generous gifts to United Way, your campaign team and colleagues have helped make a better future possible for our neighbors. Make sure all donors hear a great BIG thanks!

Consider hosting a thank you event for employees, announce results via internal communications, and send a thank you letter or email to all donors.

### SUBMIT IT

Work with your United Way representative to close out your campaign. Submit an electronic summary of donor results and information. This report will contain pledge card data, payroll summary data, and corporate pledge data. A hard copy of this information should be turned in with your campaign report envelope.

### SEND IT

Help ensure United Way is able to thank your company's donors. Work with United Way to compile a complete and accurate list of leadership donors.

Provide donor contact information so we can properly express our thanks. United Way says and shows thanks by hosting special events and publishing materials that recognize donors.



# RESOURCES

Your United Way representative or Loaned Executive is here to help you energize, engage, and inspire employees throughout your campaign. They are your greatest resource and are an important part of your team. Contact them for help with your questions, scheduling speakers, and implementing new campaign strategies.

## Tools to Build Enthusiasm

### AGENCY SPEAKERS

Do you want to hear how your dollars are at work? Arrange to have an agency speaker come to your workplace and talk about the miracles happening at United Way agencies. Our speakers educate and inspire audiences and are a great way to bring United Way's message to your workplace. (Please book at least two weeks prior to the event.)

### COMMUNITY IMPACT TOURS

If your group has two or three hours to spare, we have an opportunity that could change your life. Talk with your United Way Staff Partner about a community impact tour. During tours, groups are able to tour two United Way agencies and hear how contributions are used efficiently and effectively. (Please book at least two weeks prior to the event.)

### AGENCY FAIR

Would you like to plan an agency fair? Arrange to have two or more agencies set up a fair at your workplace. To ensure success with fairs, ask your United Way Staff Partner how to encourage employees to attend fairs with exciting games, United Way Q&A & prizes. (Fairs are year round and must be booked at least two weeks prior to event.)

### DAY OF CARING

Arrange for a volunteer experience for a team from your organization. Your team will undertake a meaningful service project such as assembling playground equipment, rehabbing and beautifying schools or parks, or working directly with a United Way agency. You will enjoy collaborating and building team spirit while making a real difference in our community!

## Keys to Success

Offering incentives results in higher levels of employee participation and makes it more appealing for employees to volunteer and give. You may wish to contact vendors with whom your company works. They may be willing to donate prizes. You can also ask executives to donate prizes. This is a fun way for them to get involved. Distribute or post a schedule of incentives (e.g., first-time contributors, captains with top-performing departments, etc.).

Here are some ideas:

- *Dinner for two at a local restaurant*
- *Two roundtrip airfares in U.S.*
- *TV, iPad or Laptop computer*
- *Add an extra day onto a holiday weekend*
- *Tickets to a local theater production*
- *Tote bag*
- *Mowing the winner's lawn*
- *Movie passes*
- *Shares of stock in your company*
- *A day off from work*
- *Health club membership*
- *Magazine subscriptions*
- *Gourmet food basket*
- *A bouquet of flowers*
- *Bookstore gift certificates*
- *Washing the winner's car*



# CAMPAIGN IDEAS TO HAVE FUN!

## Be Creative

Here are some additional ideas for fun special events that can be done around the United Way campaign. It is strongly recommended to do the payroll deduction campaign \*first\*, then do the special event.

1. Give away a prime parking space for a year.
2. Have a cute pet contest.
3. Hold a "management" car wash (where managers/supervisors wash the cars)
4. "Flying Flamingos" - Flamingos show up in the yards of employees (someone purchases the flamingo to put in someone else's yard). The "victims" have to pay to get them out and off to someone else (i.e. \$5 or \$10), or pay for "insurance" (i.e. \$20) to keep from getting them in the first place.
5. "Goofy Hat" fundraiser (similar to flamingos) - Buy a hat for \$5 to put on a coworker. \$10 to remove a hat. \$25 for insurance to not be "hatted."
6. CEO valet parks employee cars
7. CEO duct-taped to the wall - employees pay \$1 for a length of duct tape, and the boss is literally taped to the wall. There are some companies that apparently have a lot of fun with this.
8. Ice cream socials, hot dog sales, catered lunches, etc.
9. Lollipop tree – Employees pay \$1 to draw a lollipop out of a "tree." Tips of lollipop sticks are marked with various colors, which are matched to prizes (or no color means they just get the lollipop).



## **BOSSES CAN HAVE FUN TOO!**

### **ADMINISTRATORS FOR SALE**

Employees purchase raffle tickets to win an administrator for the day. The administrator agrees to work for the winning employee or department that raises the most.

### **ARREST THE BOSS**

See how much money co-workers can raise to get the boss "out of jail" or keep the boss "in jail!"

### **DUNKING BOOTH**

Pay said amount of money for three chances to dunk the boss or other favorite targets in the company.

### **GO HOME EARLY**

The boss collects a set amount of money at the front door from every employee who wants to leave work early that day.

### **EXECUTIVE TAXI SERVICE**

Co-workers pay to guess which executive will win the race.

### **KISS THE PIG**

Managers and supervisors are given funny names, (i.e. Ham Bone Jeff, John Chittlin, Bacon Bill, Suee-ieee Sue, Tammy Tenderloin) and employees can donate a dollar to vote for their favorite. Updates are given by intercom at least daily or whenever a big turnover in total has occurred. On the last day of the contest, the "winner" kisses a pig at a planned time and place.

### **POWER LUNCH**

Pay said amount of money to have lunch with an executive.

## **HOLIDAY EVENTS**

### **FLOWER SALES**

Sell flowers for Secretaries' Day, Valentine's Day, corsages for Easter, green carnations for St. Patrick's Day or chrysanthemums for Christmas.

CLOVERGRAMS – Sell 4-leaf clovergrams for St. Patrick's Day.

EASTERGRAMS – Wrap Easter Baskets and deliver them for a price.

### **GIFT WRAP**

Solicit a local business to donate boxes, bows and wrapping paper and wrap holiday gifts for a fee.

### **STOCKING STUFFER GRAB BAG**

Charge a set amount for employees to grab a company trade item from a stocking or bag.

VALENTINE'S DAY – Sell homemade candy, suckers, brownies, cookies or anything chocolate.

## **CONTESTS**

### **ADORABLE BABY CONTEST**

Post pictures of employees' children or grandchildren. Co-workers must pay a set amount per vote for the most adorable child. Ballot box stuffing is encouraged!

### **PET PHOTO CONTEST**

Employees post a picture of their pet(s) on the bulletin board. Co-workers pay a set amount per vote for the cutest pet, most unusual pet, ugliest pet and funniest pet. Award all winning pet owners a prize for their pets such as cat food, dog bones, etc.

### **POKER RUN**

Motorcycle riders can raise funds for United Way by driving to designated locations and playing a round of poker at each spot.

### **PUTTING GREEN CONTEST**

Construct a putting green in your lobby and charge a fee for employees and/or customers to putt for prizes.

### **BED RACE**

This is a great activity for your local medical school or hospital. Each department, (radiology, pediatrics, MRI, etc.) forms a team to push the department head in a bed along a designated course. Participants raise funds by collecting pledges or paying an entry fee.

### **BEAT THE BAD HABIT**

Get co-workers to stop being tardy to meetings, popping their gum, failing to recycle, leaving letterhead in the copy machine, whatever! Offenders pay a quarter for their transgressions!

DANCE CONTEST – Enough said!

### **DRAWINGS/RAFFLES**

Secure a donated prize such as certificates for dinner, weekend stay at a local resort, movie passes, concert tickets, professional/college sports games, museum passes, etc. Sell tickets and draw the winning ticket at a designated time and place. This can also be done in half- &-half fashion where half the proceeds are given away as the prize. The other half of the proceeds benefit United Way.

RACES – Running, Walking, Typing, Eating, etc.

#### GUESS THE WEIGHT OF THE DEPARTMENT

Build camaraderie by inviting co-workers to pay a set amount to predict the total weight of the department.

#### QUARTER SHOT GLASS CONTEST

Fill a large jug with water and put a shot glass at the bottom. Invite co-workers to drop quarters through a slot cut out in the lid. Provide prizes to those who drop their quarters in the shot glass.

#### SLIM INTO SHAPE

Hold a two-month contest at work for everyone who wants to lose weight. Each person pays a set amount for every pound lost or gained. Secure donated prizes for those who attain their weight loss goals.

TALENT CONTEST - You never know what talents you may uncover.

#### UNLOCK A CHEST OF TREASURES

Encourage co-workers to buy a key for a set amount. One key will open a treasure chest of prizes.

#### WHO'S THE BABY CONTEST

Ask co-workers to bring in their baby picture. Each week feature a new group of pictures on the bulletin board. Employees then purchase chances to guess which baby picture is their co-workers.

### **SPECIAL EVENTS**

Organize an outing with co-workers and spouses to enjoy music, dancing and fun. Ask for a cover charge.

#### DOWNTOWN DECK PARTY

Coordinate a party on top of the parking deck of a local hotel or airport hanger. Arrange for food, refreshments and music. Ticket prices should include food, refreshments and music as well as a donation to United Way.

#### FASHION SHOW

Work with a local designer to showcase the new seasonal or children's fashion line. Sell tickets to co-workers.

#### FUN DAY

Booths can be assembled for all kinds of fund-raising activities including a dunking booth, arcade games, children's games, train ride, pony rides, face painting, basketball free-throw challenge, food and drinks.

#### NIGHT AT THE MOVIES

Sell tickets to a screening of vintage movies and cartoons.

#### TWO-STEP LESSONS

Here is your chance to learn those line-dancing steps. Coordinate recreational dancers to teach interested employees how to two-step. Lessons can be sold for \$10.00 per couple for singles and for children under 13 at a reduced rate.

#### WALK FOR LIVING UNITED!

This is a fun-filled experience for the employees and their families who collect donations to walk a short course around the parking lot (or a city park) on a Saturday. Prizes, clowns, balloons, music and a petting zoo can be arranged for their entertainment.

### **FOOD**

#### BAKE SALE

This one's for all the bakers on staff in your company. To encourage participation, you might have a "Bake-Off" and give prizes to the best bakers. Here's a hint, hold your bake sale on payday!

BREAKFAST BREAK – Pick up donuts or muffins and sell them to hungry co-workers.

#### BROWN BAG LUNCH

Encourage employees to bring their lunch. The money saved from not going out to lunch is donated to United Way. Add an interesting twist and have everyone switch lunches.

CAFETERIA DONATION – Ask the cafeteria to donate a percentage of its sales for a day.

CANDY SALE – Now you have the perfect excuse to buy and eat candy! "It's for a good cause!"

#### CHILI COOK-OFF

Charge an entry fee for employees who want to cook up their best recipe for chili, pork, poultry, beans or barbecue. Sell samplings to hungry co-workers.

#### COFFEE DAY PROMOTIONS

Encourage a local restaurant to designate breakfast specials that include coffee. The regular coffee price is donated to United Way.

#### COOKBOOK

Collect the favorite recipes of co-workers. Compile the recipes into a booklet and sell to co-workers. You could also compile recipes on 3x5 file cards and sort the recipes by appetizers, soups, salads, main dishes and desserts. Then you could sell the recipes in groups.

FATTENING FRIDAY – Employees bring fattening desserts each Friday and sell the pastries by the slice.

HOT DOG STANDS – Get hot dogs donated and sell with a beverage and chips for a set amount.

#### ICE CREAM FLOATS

Cream soda, rootbeer, or other carbonated beverage plus two scoops of ice cream is a popular item to sell to hungry co-workers. Try to get ice cream and soda donated to increase the profit.

#### JELLYBEAN COUNTING CONTEST

For a donation, co-workers can guess how many jellybeans are in that jar. This can also be done with M&M's, Skittles, Lifesavers, etc.

#### PIZZA SALE

Get the boss to buy a few pizzas. Have the pizza delivered to the office and sell it by the slice. Many co-workers will appreciate not having to leave the office for lunch.

#### POTLUCK/SPAGETTI SUPPER

Coordinate office volunteers to bring a potluck lunch. Charge a set amount for an all-you-can-eat, home cooked breakfast or lunch.

VENDING MACHINES – Raise the cost of vending machine items by a set amount for a designated month.

## SALES ACTIVITIES

ALUMINUM CANS - Recycle aluminum cans and add the proceeds to your team totals.

BOOK SALE - Ask employees to bring in new books they have recently read. Sell the books during lunch.

#### BASKET AUCTION

Each department creates a gift basket of donated items. Baskets have themes and may include anything from trinkets to trips! Display baskets and then auction or raffle them off.

#### CAR WASH

You probably did this in high school. The difference is, now you can charge more. All you need is car washing soap and water and a few hard-working volunteers. Bank parking lots are great for Saturdays.

#### GARAGE SALE

Have a big parking lot garage sale of items that employees have brought from home or inventory your company would like to discard.

#### CHANGE CANS

Attach short messages to empty, clean paint cans and distribute them in high traffic areas. Example: "Reason #1 to Drop Your Coins in the United Way Change Can – 28 families saved from loosing their homes in 2008." "Reason #2 to Drop your Coins in the United Way Change Can – 43 service projects completed for citizens in need." "Reason #3 to Drop your Coins in the United Way Change Can – CALL 211 can help you find the assistance you need."

#### DREAM SEASON

Secure donated season tickets (possibly box seats) for local sporting or Arts Council events. Sell raffle tickets for each event.

#### PUNCH CARD SALES

Get cards donated by a local restaurant that offer a percentage discount to the bearer. Sell the cards for \$2.00 each with all proceeds benefiting your United Way campaign.

#### RESERVED PARKING

Sell raffle tickets or auction the best parking spot. The winner can park in the spot for a week or a month.

#### SILENT AUCTION

Donated items such as dinners for two, a weekend get-away, handcrafted items and more are displayed for a full day. Slips of paper are filled out with a bid, name and phone number. At the end of the day, the highest bidder gets to buy the items. Purchase amount of item benefits United Way.

#### WINDSHIELD CLEANING SERVICE

Employees and their families take turns on a designated Saturdays to clean car windows at bank teller drive-up windows, fast food drive-ins, gas stations, etc. Donations given benefit the Victoria County United Way.

## SPORTING ACTIVITIES

#### AEROBIC-A-THON

Secure a local health club chain to sponsor a three or four hour aerobic dance session. Participants collect sponsorship to get into shape!

BOWLING - Coordinate a company bowling outing. Each person has to pay a set amount for missing a pin.

CAR BASH - Find an old battered car and allow employees to pay to take a swing at the car.

#### CELEBRITY BAGGER PROGRAM

Imagine the grocery shoppers' surprise to find the mayor, a surgeon, radio personality or district attorney bagging groceries at the checkout stand. These celebrities raise a pre-determined amount before they arrive at the grocery store. Then they bag groceries for an hour to raise tips any way that they can.

#### EXERCISE FOR MONEY

Fill in a mileage log for miles walked, run or cycled. Secure a company contribution for total miles covered. Company T-shirt is given for those participating two times a week for one month.

#### FISHING TOURNAMENT

Charge an entry fee and award prizes for catching the largest fish (by weight and total catch by weight, limit eight fish) Food and soft drinks can also be sold.

#### MALIBU RACE OF CHAMPIONS

Challenge your competitors on the track. This three-lap race in miniature cars pits representatives of different teams against one another. Each team has three members who take turns competing for the fastest times. Individual team trophies are presented to the first, second and third place teams.

#### MINIATURE GOLF

This is a fun outdoor activity for all teams. Four person teams compete for donated prizes in such contests as hole-in-one, highest score, lowest score, etc. Separate entry fees are a set for adults and children under 13.

#### MINIATURE GOLF NIGHT

Ask the local miniature golf location to donate a set amount of money for every round of golf played on a designated night or weekend.

#### OFFICE OLYMPICS

Create your own office games to include such contests as: most creative voice mail, cleanest office, fastest typing, guess the number of steps from the copy room to the mailroom, etc.

#### SUPER BOWL PARTY

Invite guests to pay a set amount for each of the following predictions: quarter score, halftime score, final score, number of fumbles, touchdowns, etc.

#### TOURNAMENTS

Challenge other companies to a Saturday softball, basketball, darts, golf, or bowling tournament. Charge an entry fee and invite each company to sell refreshments.

#### READY TO GO EVENTS

##### BLUE JEANS DAY

Declare a "Dress Down Day(s)." Stickers are available from United Way office for your employees to purchase. A five-dollar donation is given in exchange for a sticker which, when worn, will allow them to wear jeans to work on the designated day(s). This can be done as many times as management will allow leading up the end of the company's campaign (i.e. every Friday). Proceeds benefit United Way.

**UNITED WAY STAFF WILL ASSIST  
IN ANY WAY WE CAN WITH ANY EVENT OR FUN  
ACTIVITY YOU'D LIKE TO DO WITH YOUR  
EMPLOYEES**



# YOUR QUESTIONS

## **What is United Way?**

United Way of Southwest Alabama is an independent local non-profit organization that focuses on human service needs of communities in this area. United Way is much more than a fund-raising organization. United Way is about changing lives. That's why the United Way, together with other community-minded supporters, works to implement solutions that lead to positive outcomes for the community. Our primary service area (but not limited to) includes Clarke, Choctaw, Mobile and Washington counties.

## **Who runs United Way of Southwest Alabama?**

Governance is provided by a thirty member Board of Directors including a ten member Executive Committee, and a twenty member Board of Trustees. Our leadership is comprised of local volunteers who are responsible for setting policies, the organizational operating budget and for overseeing the direction of the United Way of Southwest Alabama. The 2017-2018 Board Chairman is Charles Hyland, Director for Mobile Area Water & Sewer System.

## **What is the difference between United Way of Southwest Alabama and United Way Worldwide?**

United Way Worldwide is the national organization dedicated to leading the United Way movement in making a measurable impact in every community across America by focusing on the underlying causes of the most serious problems.

The United Way movement includes over 1,800 community based United Way organizations. Each is independent, separately incorporated and governed by local volunteers. There are no fund-raising quotas, and all resources are under local control and decision-making. Dues to United Way of America are less than 1% of our budget and are recouped by our community many times over in training, services and access to national corporations.

## **How do I know that my donation is wisely spent?**

When you give to United Way of Southwest Alabama, you entrust your hard-earned dollars to a local organization that takes this trust very seriously. The organization is committed to the highest standard of fund responsibility, transparency and stewardship. United Way volunteers oversee grants to local programs and closely monitor agency services to hold them accountable for integrity in their programming and business operations.

Just as important, United Way of Southwest's own operating expenses and records are audited by an independent accounting firm and carefully scrutinized by a volunteer finance committee to protect this trust. Local administration costs are only 12%, which means 88% of every dollar raised goes into local programs and services benefiting residents in communities in our four county areas.

## **How can I get more involved?**

United Way of Southwest Alabama and its partner organizations need and appreciate volunteer participation. The United Way of Southwest Alabama's program Volunteer Connect is helping increase volunteerism and mobilize resources to meet our community needs. Volunteer Connect is an easy-to-use website that matches volunteers with the right opportunities in our neighborhood. Contact United Way of Southwest Alabama at (251) 433-3624 for more information or visit Volunteer Connect at [volunteer.uwsa.org](http://volunteer.uwsa.org)

## **What requirements must United Way agencies meet?**

To be eligible to apply for funds through United Way of Southwest, you must meet the following requirements: be a United Way of Southwest Alabama partner, a 501 (c) 3 non-profit health or human service agency serving residents of our service area; document cost-effective delivery of high-priority programs and services; demonstrate sound financial and administrative management practices; comply with all applicable laws; be governed by a board of directors; and demonstrate impact through measurable outcomes. (i.e. show that they get results.).

# GLOSSARY OF CAMPAIGN TERMS

**2-1-1.** The FCC-designated national abbreviated dialing code for access to health and human services information and referral (I&R) nationwide.

**Account.** An organization or individual invited to financially participate in the campaign.

**Accountability (fiscal).** The responsibility of ensuring that each dollar raised is accounted for and well spent.

**Account Number.** A numerical code that is used to reference each campaign account and which indicates how the account is placed within the campaign structure.

**Account Executive/Volunteer.** The person responsible for contacting an organization for one or all of the following activities: corporate gift, CEO's personal gift, leadership giving campaign, employee campaign and/or loaned executive support.

**Active Community Investor.** An individual who invests \$500 or more to a local community organization, invests time as a volunteer, and may not currently invest in United Way.

**Administrative Costs.** Funds needed to carry out the day-to-day functioning of the organization; public accountability; maintenance of facility; legal activity.

**Agency Tours or Site Visits.** Visits to selected agencies designed to offer an on-site education on how the donors' United Way dollars are put to work and how community services are delivered.

**Allocation.** Funds granted to an agency or program, typically for a 12-month period (see multi-year funding).

**Allocations Committee.** A group of volunteers who determine how available fund will be distributed to various agencies/programs.

**Allocations System.** The process through which volunteers review applicants for United Way funds to ensure that they meet identified community needs and are efficient and effective. Through this process, volunteers determine the appropriate level of funding, if any, each agency/program will receive from United Way.

**Average Gift.** Total gift from company's employees divided by the number of givers.

**Bill Direct or Direct Bill.** A pledge option in which the donor requests a billing statement from the United Way organization, then pays the pledge upon receipt of this bill.

**Broadening the Base.** The effort to spread the responsibility of giving more widely to include markets or areas of the campaign with low-giving levels.

**Campaign.** A period, most commonly between early September and mid-December, when United Way conducts the majority of its fundraising efforts in the community.

**Campaign Analysis.** Analysis of giving, for example, by division, section, unit, company.

**Campaign Audit.** The outside verification of pledges and cash gifts to ensure that campaign results are accurately tracked and reported.

**Campaign Cabinet.** Members of the "executive committee" of the fund-raising effort being led by the Campaign Chair and which includes key leaders from the community.

**Campaign Case.** A concise statement of purpose and rationale for the campaign, which is refined annually to reflect changing needs.

**Campaign Costs.** The annual expenses of conducting a local campaign, including salaries, promotional materials, fixed office expenses, etc., that are directly related to campaign activity. Keep campaign costs separated from other overhead expenses.

**Campaign Film.** A film or video production used to educate and inform local audiences about the United Way movement in an effort to encourage giving.

**Campaign Slogan.** A distinctive phrase or catchword used to focus public attention on the United Way organization.

**Campaign Timetable.** A schedule that lists time frames for all the campaign responsibilities and actions required, beginning with recruitment of the Campaign Chair through the post-campaign analysis.

**Card Value.** The total current dollar value of each campaign giving account.

**Combined Federal Campaign (CFC).** A federally-regulated campaign that governs all fund raising by private voluntary agencies among federal employees at their places of employment and members of the armed forces at their duty stations.

**Communications Committee.** Members are responsible for year-round public relations and development of an intensive promotional and public information effort during the campaign.

**Community Impact.** Mobilizing communities to create lasting changes in community conditions that improve lives.

**Company Campaign Chair/Coordinator/Employee Campaign Manager.** The person selected to manage the United Way employee campaign within a given company or organization.

**Companywide Campaign.** A plan for employee giving developed by a national firm and implemented at all its local plants and offices. This national effort relies on local giving guidelines and materials.

**Continuous Payroll Deduction.** An employee payroll pledge that automatically rolls over from year to year without requiring the employee to reaffirm it annually, but providing the employee with the ability to stop, increase or decrease the pledge upon request. Works best when applied as a percentage of salary rather than a set dollar amount.

**Corporate Gift.** An annual contribution made in the name of the firm or organization.

**Deferred Giving.** A form of donor giving in which the beneficiary organization receives the principal or corpus of the gift a considerable time after the decision to give was made by the donor, usually after the donor's death.

**Designation.** An option provided donors during the campaign that allows donors to direct their contributions to a specific agency or program.

**Division.** A United Way grouping of campaign accounts that are classified according to similarities in their make up. Often, such groupings are based on size, trade, geographic location or a combination of these considerations.

**Donor Choice.** A feature of the campaign and fund distribution process through which donors are permitted to designate their contributions to specific tax-exempt human-service organizations, programs or services that may or may not be funded through United Way's Fund Distribution process.

**Employee Goal.** An established dollar-amount that represents the desired total contribution in an employee campaign; it is based on a formula that considers potential for growth.

**End to End Solution.** Being able to capture a pledge from its inception and paying out after processing to the local United Way or direct to the agency.

**Final Report.** The reported results of an organization's completed campaign.

**Fund Distribution.** The citizen review system through which United Way member organizations distribute the funds they raise.

**Funding Cycle.** The period during which allocated dollars are paid out to funded organizations. May be July to June, January to December, October to September.

**General Campaign Goal.** The overall campaign goal, which members of the Campaign Cabinet establish and the Board of Directors approves.

**Giving Guide.** United Way's suggested standard for corporate and individual levels of giving based on the ability to give.

**Group Solicitation or Group Meeting.** A brief (20-to-30 minute) meeting, held on company time, at which groups of employees learn more about United Way movement through videos, special speakers and United Way staff. Employees are given pledge cards and asked to make informed giving decisions. Employees are usually asked to sign their pledge cards at the end of the meeting.

**Inclusiveness.** One of the core strategies that United Way organizations implement to accomplish their mission. This strategy is designed to broaden the circle of United Way's services and those who have ownership in the United Way organization. It considers people, geographic areas and agencies.

**Kick Off.** The formal start of a campaign in a community through an event that receives communitywide attention.

**Labor Participation Committee.** A committee whose membership includes leaders of organized labor and whose job it is to advise and participate in managing employee campaigns.

**Leadership Giving.** Gifts from donors beginning at \$1,000 and ending at \$9,999.

**Loaned Executive.** The employee who is selected by the company or organization and assigned to work in the United Way campaign for a specified period of time. The loaned executive acts as an extension of the United Way staff and complements the staff and volunteers by ensuring quality customer service to all campaign accounts.

**Mail Solicitation or Direct Mail.** A direct appeal made through the mail and typically used in selected small business and residential campaigns.

**Major Gifts.** Gifts from donors beginning at \$10,000 and ending at \$99,999.

**Market.** A distinct group of actual or potential customers.

**Market Segmentation.** Identifying distinct market groups according to shared characteristics in an effort to develop campaign plans and case messages personalized to each market group.

**Megagift.** Gifts from donors beginning at \$100,000.

**Metro Size.** A classification of United Way communities that ranks communities according to the campaign amounts they raise.

**Million Dollar Roundtable.** Donors who pledge to contribute \$1 million or more up front or over a 1-5 year plan to United Way.

**Mission.** A statement that expresses the purpose of an organization.

**Needs Assessment.** A systematic examination of community needs designed to help decision-makers focus limited resources, including time, money, personnel and materials on specific, mutually accepted community objectives and activities.

**New Hires Program.** Enrolling new employees at the time of hire for a contribution to the United Way organization through payroll deduction.

**New Money.** Funds raised in excess of card value.

**Non-Recurring Gift.** A contribution made to United Way organization for a single campaign as a result of special circumstances. In most cases, this gift is made in addition to a normal annual contribution. Also called one-time money.

**Pacesetter Campaign.** In a company that agrees to specialized advance preparation and solicitation, this campaign is designed to provide an example and build enthusiasm for the general communitywide campaign. Pacesetter campaigns usually take place between June and September and provide significant dollars early in the campaign.

**Per Capita Gift.** The campaign measurement arrived at by dividing the total employee or corporate gift by the total number of employees at the company.

**Planned Gifts.** A gift planning technique used by donors to give gifts of appreciated assets during their lifetime and beyond.

**Pledge.** A promise to make a contribution in installments over a specified period of time.

**Post-Campaign Critique.** The process through which the campaign is evaluated and suggestions for future improvements are formulated.

**Prospects.** Potential contributors to the campaign.

**Report Meeting.** A key campaign meeting held for the purpose of receiving reports and collections from all solicitors, companies, etc., in order to publicly announce the progress of the campaign and build enthusiasm for it.

**Shrinkage.** Uncollectible pledges, usually as a result of employee turnover.

**Solicitor.** A company campaign volunteer with responsibility for asking other employees for pledges to the United Way organization or a person who assists the Campaign Chair and Campaign Cabinet by calling on a CEO.

**Speakers Bureau.** A group of well-informed individuals who are forceful speakers and whose job it is to appear before employee groups and others to enlist their support and money for the campaign.

**Special Events.** Public events held to attract positive attention to the campaign, inform the public and motivate volunteers.

**Status Report.** A periodic campaign report that indicates progress throughout the campaign on completed assigned campaign contacts and the achievement of campaign goals.

**Tocqueville Society.** A national major gifts society, sponsored by United Way of America, with chapters in United Way member organizations across the country. Members of the Tocqueville Society give annual gifts of at least \$10,000.

**Trade Group Giving Analysis.** An analysis of giving trends by trade group in which firms are compared to determine how well they are doing and what their giving potential may be.

**Truist (formerly United eWay).** A seamless end-to-end solution which combines online giving with integrated pledge processing and fund distribution services. Truist offers online reporting and volunteer programs.

**Unit.** A number of related campaign accounts grouped together.

**Venture Funds.** A fund distribution strategy whereby time-limited grants are made to new, innovative, generally non-traditional services.

**Victory Celebration.** Special event at which the final campaign report is presented to the community and final results are announced.

**Zero Accounts.** Companies and individuals with no record of giving to previous United Way campaigns.





**UNITED WE FIGHT.  
UNITED WE WIN.**

**LIVE UNITED**

Please let us know how we can help you with your 2017 United Way campaign!

Take a moment to fill out the form below and let us know the number of campaign supplies needed this year and who will be running your campaign.

**COMPANY/ORGANIZATION:** \_\_\_\_\_

**2016 CAMPAIGN RESULTS:**

Corporate gift: \_\_\_\_\_

Employee gift: \_\_\_\_\_

Total: \_\_\_\_\_

**2017 EMPLOYEE CAMPAIGN COORDINATOR:** \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

**COMPANY INFORMATION**

Number of current employees: \_\_\_\_\_

Our 2017 campaign will kick off on: \_\_\_\_\_

**CAMPAIGN MATERIALS REQUEST FORM**

<i>Item</i>	<i>Check for "Yes"</i>	<i>Number Requested:</i>
2017 Campaign Brochure		
2017 Pledge Card		
Goal Thermometer Poster (11"x17")		
Campaign Posters (11"x17")		
2-1-1 Posters (11"x17")		

Please return this form via email to your United Way campaign representative or fax to (251) 431-0120.



United Way  
of Southwest Alabama

