

United Way of Pasco County  
Employee Campaign Coordinator  
TRAINING 2010-2011



August 10<sup>th</sup>, 2010  
Land O'Lakes Community Center  
5401 Land O'Lakes Boulevard  
Land O'Lakes, FL 34639

# BE INFORMED

## Who is United Way of Pasco?

United Way of Pasco County is a 501 (c) non-profit organization that takes a leadership role in mobilizing resources of individuals, companies, and government to achieve positive and lasting change in the lives of people in our community.

### **Key message points to use when communicating to your employees:**

#### **United Way of Pasco County:**

- Strengthens our community
- Strives for positive, lasting change by supporting community impact areas like Education, Income, Health and Basic Needs
- Partners with 23 non-profit agencies who understand and also strive for changes in our community impact areas.
- Create community awareness and produce measurable results in the community.

#### **EDUCATION:**

Helping individuals achieve their potential by:

- Improves access to quality, affordable child care and early learning opportunities
- Providing after-school and mentoring programs for at-risk youth

#### **INCOME:**

Helping families become financially stable and independent by:

- Supporting basic needs while increasing financial education
- Helping hardworking people obtain job training and family-sustaining wages

## HEALTH:

Improving the health of people in our community by:

- Increasing access to critical healthcare services
- Reducing substance abuse, child abuse and domestic violence

## LIVE UNITED:

- Symbolizes the power to facilitate change in the community
- When we think outside ourselves, we change lives and influence others.

## DONATING:

- A large number of employees pledge \$1 a paycheck or 1 hour per pay period – together these dollars add up.
- Fair Share Giving – if you make up to \$25,999 your fair share would be 1 hour pay per month. If you make \$26,000 or above your fair share would be 1% of your yearly salary.
- Give \$1 more dollar per week -- pays for a family member to learn sign language; a Cub Scout to attend camp; 13 generic prescriptions filled; 1.2 professional counseling services
- 3436 people received job development services in 2009
- \$100 will run a shelter for 5 days giving a safe haven for up to 24 women and children

## OTHER OPPORTUNITIES:

- **Day of Caring:** April 10-16, 2011 -- Volunteer during *National Volunteer Week*
- **Dial 2-1-1 For Help:** Let our staff direct you to the appropriate service. Receive help for health care, rent, utilities, taxes, counseling, intervention and more.
- **Prosperity Campaign:** Let one of our volunteers help you with your tax refund to provide stability to you and your family. In 2010, 6,506 tax returns were prepared for a total of \$6,206,056 in refunds.
- **Partner Agency Tours:** Take your employees on a tour of a local partner agency to experience first-hand the rewards of their donation and the impact it makes in our community.

## How United Way Uses Your Contributions?

It is estimated that United Way and its funded agencies touch approximately 20,000 lives per year! Those agencies that do apply have a deadline to meet rigorous financial requirements verifying their fiscal responsibility (that means we look at their books!), and to show that their programs fall into our standards for measurable outcomes (this means they must have the figures to prove their programs are working!) If, for any reason an agency does not meet all of these standards, we are not able to include them in our partnership.

The following agencies applied and were approved to receive funding from United Way for the year 2010-11:

- American Red Cross ● Bay Area Legal Services
- BayCare Behavioral Healthcare ● Big Brothers Big Sisters
- Boy Scouts — Gulf Ridge ● Boy Scouts — West Central Florida
- Boys & Girls Club of Tampa Bay ● Catholic Charities
- CARES ● Connections Job Development
- CredAbility (formerly Consumer Credit Counseling)
- Deaf & Hard of Hearing Services ● Girl Scouts of West Florida
- Good Samaritan Health Clinic ● Gulf Coast Jewish Family Services
- HPH Hospice ● Lighthouse for the Visually Impaired & Blind
- Suncoast Epilepsy ● Sunrise of Pasco County ● The Center for Independence
- YMCA of the Suncoast — James P. Gills ● YMCA of East Pasco
- Youth and Family Alternatives

INSERT PARTNER AGENCY DESCRIPTIONS!

# YOUR ROLE AS ECC:

## SETTING UP AND ACHIEVING GOALS

### Be Prepared!

- Develop a plan of action, follow best practices and make your own outline.
- Communicate the support and endorsement of your CEO/upper management for a successful campaign. Ask them to officially endorse it with a personal letter or a speech at the staff meeting. Let them know ahead of time that you will come to them to ask permission to run special events, purchase food and rewards.
- Seek Help! Don't feel you have to fly solo if you have a large company. Ask a friend or department head to help you co-chair your campaign efforts. No takers – don't worry. Call our office for help. We're here for you!
- Set a participation goal. To ensure that associates do not feel pressured, it is not recommended to set a participation goal above 80%. Set a dollar amount based on last year's total gift and then decide on a realistic increase over last year's donations.
- Set a goal of 100% "ASK". Ask Everyone! Make sure everyone receives a pledge form. If your company prefers your own pledge form or pledging on-line, you might just include a brochure and "stuffer" information in their paycheck.
- Set a goal of 100% pledge form collection. Make sure all forms are signed, even if they are not filled out with a pledge.

## Raise Awareness and Participation:

- A 10-15 minute presentation by United Way at an already schedule group meeting is the number one way to raise awareness, educate, inform and inspire your associates. These meetings can be coordinated through the United Way office by calling 727-835-2029. We will provide you with brochures, pledge forms, pledge envelopes and “stuffer” materials.
- Schedule a speaker! Your meeting becomes personable when an associate from our Speaker Bureau Group shares his/her experience (or that of a friend or family member) with a United Way program.
- In addition to presentations, conduct an e-mail blitz highlighting the impact their United Way gifts make. Post United Way posters and stories on bulletin boards, in employee publications and in the staff lounge.
- Have a special event and invite United Way to set up a table display. This allows co-workers to browse information and not feel self-conscious.
- Establish friendly inter-department competitions, such as an office pizza or popcorn party for the department that raises the most or has the highest participation.
- Food always draws a crowd! Provide refreshments at your United Way events.
- Provide incentives and prizes. Sometimes we all need a little “dangling carrot” to make us take action. We have companies who sell chances for jean day, vacation day, special parking and auction off prizes, such as movie tickets, free oil change, lottery tickets and spa days. Use your imagination and discuss your budget with upper management.

### The 15-Minute Group Meeting SAMPLE AGENDA

<u>Item</u>	<u>Presenter</u>	<u>Time</u>
Opening remarks	Employee Coordinator	2 min.
CEO Endorsement	Company Leadership	1 min.
United Way overview	United Way Rep	5 min.
Speaker	United Way Agency/ Volunteer	5 min.
Ask for the Gift	Employee Coordinator/ United Way Rep	1 min.
Closing comments	Employee Coordinator	1 min.

**SAY THANK YOU!**

## How to Make the “ASK”



How do you plan to ask each individual associate to give to United Way? The most effective “ask” includes an educational piece along with the human element, which is, the personal touch of a true story, a presentation, an e-mail, or a letter from you or upper management explaining why their gift is needed. Don’t just leave a pledge form on someone’s desk and hope they “feel the need.”

Most people will respond when personally presented with a request. Face-to-face solicitations, be it from a United Way presentation or a co-worker’s encouragement is the most effective way to “make the ASK”.

**DID YOU KNOW?** The number one reason why people don’t give to United Way is because they were not asked! That’s why we urge you to make sure every employee returns a completed pledge form – even if they decide not to give this year – to ensure that at least they were asked to give!

# Ways of Giving

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

# LIVE UNITED™



United Way of Pasco County  
P.O. Box 609, Port Richey, FL 34673  
727-845-3030 • Fax 727-845-3032

NAME FIRST, MIDDLE, LAST  
 HOME PHONE  
 WORK PHONE  
 COMPANY NAME  
 CITY  
 STATE  
 ZIP CODE  
 HOME ADDRESS  
 FAX NUMBER

**Give.** I would like to be a part of focusing on the building blocks for a better life by contributing.

### PAYROLL DEDUCTION

I'll contribute the following gift each pay period until changed or revoked by me:

\$3  
  \$5  
  \$7  
  \$10  
  \$15  
  \$21  
  \$42

Other: \_\_\_\_\_

I am paid:  every 2 weeks (26)  
  2x a month (24)  
  weekly  
  monthly

My annual gift is: \$ \_\_\_\_\_

### CASH / CHECK

I'm enclosing my gift of: \$ \_\_\_\_\_

Cash (Attach cash)

Check (Attach check)

Please make checks payable to United Way.

### PLEASE CHOOSE HOW YOU WANT TO INVEST IN YOUR COMMUNITY.

Option A  **COMMUNITY CARE** I want my gift to go where it is needed most. Please allow the volunteer Citizen Review Panel to determine the community's greatest needs and allow me to impact those needs. AMOUNT \$ \_\_\_\_\_

Option B  **EDUCATION** Helping children and youth achieve their potential. AMOUNT \$ \_\_\_\_\_

**INCOME** Helping families become financially stable and independent. AMOUNT \$ \_\_\_\_\_

**HEALTH** Helping people maintain and improve their health. AMOUNT \$ \_\_\_\_\_

**SAFETY NET** Helping individuals maintain independent living and disaster relief. AMOUNT \$ \_\_\_\_\_

Option C  **SPECIFIC AGENCY**  
AMOUNT \$ \_\_\_\_\_  
AGENCY NAME AND ADDRESS \_\_\_\_\_

### LEADERSHIP GIVING

**MY GIFT OF \$1,000 OR MORE** qualifies me for membership in the Leadership Giving Society. My name will be listed as appears to the right.

AMOUNT \$ \_\_\_\_\_

### RECOGNITION

Please list my/our name(s) as follows:

\_\_\_\_\_

I wish for my gift to remain anonymous.

### LOYAL CONTRIBUTOR

I have been contributing to the United Way since \_\_\_\_\_

I want to know how to include United Way in my will and leave a lasting legacy to my community.

**Advocate.** Yes, I can make a change by using my voice. United Way needs people who are passionate about education, income and health to make some noise!

Please sign me up for the United Way Action Alerts and Newsletter so I can stay informed about advocacy opportunities in your community.

**Volunteer.** I would like to donate my time by volunteering for United Way.

Please contact me with more information about how I can get involved with my community.

SIGNATURE: \_\_\_\_\_

Please check the accuracy of all your entries.  
Thanks for investing in United Way.

Thank you for your contribution through the United Way campaign. Please keep a copy of this form for your tax records. You will also need a copy of your pay stub, W-2 or other employer document showing the amount withheld and paid to a charitable organization. Consult your tax advisor for more information.

\*A copy of the official registration and financial information may be obtained from the Florida Department of Consumer Services by calling toll-free within the state, (1-800-35-7352). Registration does not imply endorsement, approval, or recommendation by the state.

WHITE - PAYROLL RECEIPT

YELLOW - UNITED WAY PASCO COUNTY

PINK - CONTRIBUTOR RECEIPT

## Don't Forget to Say Thank You!

Saying “Thank You” is the most important element in maintaining the long-term support you’ve worked so hard to achieve. That’s why United Way has developed a number of ways to thank and recognize generous donors and the hard working volunteers within workplace campaigns.

Supplying our office with employee names, addresses, emails and donation amounts for Leadership Donors who give over \$250 will allow us to give them recognition and appreciation.

Be sure to announce the total amount raised on a poster, in your company newsletter, on your website, in a CEO Special Thank You Letter. You could even host a fun “Thank You” event like a pizza party or a cookout.

If you would like a promotional photo-shoot after the campaign is over, please let us know – we’d be honored to come to your workplace, pick up your envelope and participate in an acceptance ceremony.



# DONOR INFORMATION SHEET

COMPANY NAME _____	NUMBER OF EMPLOYEES _____	
CAMPAIGN START DATE _____	END DATE _____	# OF PAY PERIODS/YEAR _____
DONOR NAME _____	DOB _____	
HOME ADDRESS _____		
EMAIL ADDRESS _____		
HOME PHONE _____	MOBILE PHONE _____	MARRIED/SINGLE /DIVORCED _____
NUMBER OF YEARS IN PASCO COUNTY _____	PREVIOUS CITY/STATE _____	
NUMBER OF YEARS GIVING TO UNITED WAY _____		
PHILANTHROPIC INTERESTS _____		
_____		

## Reporting Results

The last step is **Track Your Progress** – everybody loves a winner and jumps on a bandwagon when things are going well. Publicly report results to your co-workers as you move along. When you are finished, complete the Reporting Envelope and call our United Way office to arrange for someone to pick up pledges and pledge forms.

If you use online pledge processing, make your best effort to get us the information we need. Our next year budget is based on your pledge amounts.

## Now You've Done It!

We recognize this as a huge effort on your part, and know our campaign depends on people like you who put in extra time and thought to solicit these donations for us.

You should recognize the good that comes from your work. Every day, we or someone from our funded agencies will interact with a person in need. Perhaps it will be someone you know who lost their home, a mother struggling to help keep the roof over her children's heads, an elderly person waiting for their one meal of day to be delivered, a run-away teenager who parents believe there is no hope.

**LIVE UNITED!**

**You make all the difference in the world!**

## WORKPLACE CAMPAIGN CHECKLIST

Item	Volunteer	Comments	Done ✓
<b>Select Dates</b> for Campaign: Start Date _____ End Date _____ (no later than Nov. 20 <sup>th</sup> )	Coordinator and Management		
<b>Meet with Management:</b> Ask for their assistance; Ask for their \$ contribution; Ask for a campaign budget; Ask if they will appear at the kickoff meeting; Keep them in the loop!!	Coordinator		
<b>Calculate a \$\$ Goal</b> Amt.	Coordinator		
<b>Pick a theme</b> for campaign			
<b>Set a Meeting</b> Date & place			
<b>Decide your approach</b> for obtaining pledges and return of pledge forms			
<b>Call United Way</b> to ask for a speaker for meeting			
<b>Make sure you have</b> supplies/ decorations, posters etc			
<b>Select a "Fun"-Raiser</b> Event			
<b>Obtain</b> incentive prizes			
<b>Write up</b> your thank you list			
<b>Fill out</b> the campaign report and call United Way to pick up.	Coordinator		
<b>Schedule</b> a Photo Shoot	Coordinator & Mgmt.		
<p>Breathe, Breathe, Breathe! Relax - put your feet up and allow yourself a smile of satisfaction for a job well done!</p>			

# “FUN”D RAISING IDEAS!

- ◆ **Auctions:** Encourage employees to donate unique items of value to auction off during a lunch hour, or during another event.
- ◆ **Bake Off:** Who makes the best chocolate chip cookies in your organization? Find out by having a bake-off and charge a “donation” for others to sample the different cookie entries and judge the winners. (Bake extras to sell!)
- ◆ **Baby Picture Contest:** See who can match the most staff members with their baby pictures. Charge \$1 to enter pictures, and \$1 to make guesses – offer a prize for the most correct guesses.
- ◆ **Bowling for Dollars:** Recruit some teams and have a company bowling night, raising money via entry fees or per pin donations.
- ◆ **Casual Dress Days:** This is a big hit in any organization that has a dress code. Sell casual or jeans days each week. If you already have a casual day, allow additional days (with management’s permission of course!) or have a sports dress day or hat day that employees can buy into!
- ◆ **More Good Days:** Sleep-In Days, Long Lunch Days or Vacation Days can also be “sold”.
- ◆ **Take the Knots Out:** Bring in a massage therapist for a day and allow all those who submit a pledge form to sit down to a relaxing shoulder massage.
- ◆ **Can You Top This:** Serve ice cream and all the toppings at a meeting or rally.
- ◆ **Pie Toss:** Depending on the amount of their contributions, employees can be given a chance to toss a pie at their departmental manager.
- ◆ **Air Out Those Sneakers:** Celebrate Sneaker Day by having employees compete for the “most original, most beyond repair, most in need of soap and water”, etc.
- ◆ **Soup for the Soul:** Have large pots of soup and hold a soup and bread line for your employees. On the tables leave facts regarding hunger in your community.

- ◆ **Department/Office Olympics:** Race on casters chairs using plungers as the only means of transportation. Race around a special obstacle course requiring employees, carrying a lunch box, to navigate their way “to work”. Once at work, they put their feet on their desk and toss wadded paper into a waste-basket.
- ◆ **The Price is Right:** Hold a game show in the lunch room with contestants paying to enter and compete for prizes.
- ◆ **Pumpkin Carving Contest:** Plan a Halloween theme and hold a pumpkin carving contest. Have different categories so you can have multiple winners. Departments could carve their own and enter them.
- ◆ **Raffles:** Have someone donate a prize – football tickets, a weekend getaway, a car wash, restaurant gift cards. Give-A-Way lottery tickets, engraved pens, **T-SHIRTS**
- ◆ **Scavenger Hunt:** Employees have to find unusual items around the office or the campus. You plant the items for employees to discover – or plant prizes and whoever finds them keeps them!
- ◆ **Snack Cart:** Go from workspace to workspace with baked goods or candy.



**Whoops!** Don't confuse fund-raiser events with the events and meetings you hold to impart United Way information to the masses. "Fun"d-raisers are for extra money, and they make the campaign special, allow a little fun, and draw attention to your program.