

United Way of Northern Arizona Campaign Planning Guide

A tool kit to make your campaign fun and successful!



EDUCATION. INCOME. HEALTH.

Thank you to our sponsor:



LIVE UNITED™



United Way
of Northern Arizona

An Independent Licensee of the Blue Cross and Blue Shield Association

Dear Campaign Coordinators:

What an exciting opportunity for all of us to help our community.

Cindy and I have supported the United Way of Northern Arizona since we arrived in Flagstaff in 1988 (when we were 12 years old!) for many reasons. Simply put, we believe supporting the United Way is the best way to make an immediate and lasting impact to help people in the community where we live.

This town has always risen to the challenges placed before it. We are certainly confronted by challenges this year as the economic outlook remains bleak. Last year the campaign brought in over \$1.5 million. This year, as the needs of the community are even greater, we are setting a goal of \$1.6 million. So we are asking for your help in carrying out a successful campaign.

Our trials we face reveal what we are made of inside. We believe the people of Flagstaff are made up of caring individuals and this coming year will reveal their generous nature.

Thank you for your commitment and caring.



Sincerely,

Cindy Harris Hilton Harris

Hilton and Cindy Harris

2009-2010 United Way of Northern Arizona
Campaign Co-Chairs

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2009-2010 UNITED WAY OF NORTHERN ARIZONA BOARD OF DIRECTORS

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City of Flagstaff

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Production Manager
APS Cholla Power Plant

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OUR DONORS

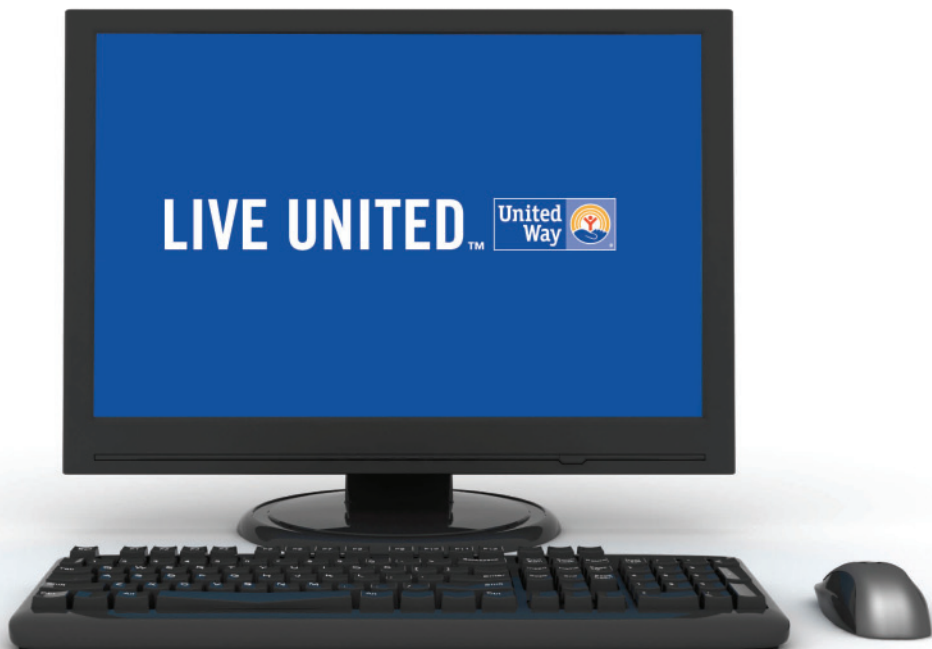


WHAT ARE THE REASONS PEOPLE GIVE?

1. Asked by someone they know
2. Asked by clergy
3. Reading or hearing a news story

4. Being asked by peer at work

5. Someone coming to your door
6. Tele-athon or radio-athon
7. Receiving a letter
8. Advertisement
9. Television commercial
10. Telephone call



UNITED WAY OF NORTHERN ARIZONA'S PROMISE

DONOR NEEDS ↓	UNITED WAY PROMISES ↓	DONOR BELIEF ↓
<p>I want to make the greatest difference possible</p> <p>There are so many non-profits out there, it's hard to know where my contributions will do the most good</p> <p>I want to feel good about what I give</p>	<p>Multiplies my impact in improving people's lives and my community</p> <p>Lets me know what is being accomplished with my contributions</p> <p>Is my partner, using its professional and volunteer expertise together to improve people's lives and my community</p> <p>Appreciates my caring and commitment to improving people's lives and my community</p>	<p>My United Way's reach of caring enables me to make the greatest difference in improving people's lives and my community</p> <p>My United Way is accountable in stewarding my contributions and showing me their results</p> <p>My United Way's leadership, experience, and breadth of resources effectively address the most important health and human services problems in my community</p> <p>My United Way makes me feel great about giving</p>

INTEGRITY

United Way of Northern Arizona sets and holds high standards for both our conduct and that of those with whom we collaborate.

Contributions of time, effort and money made to us are held in trust to be invested in building our community in a manner prescribed. We are effective, efficient and wise stewards of each donor's investment.

LIVE UNITED™



United Way
of Northern Arizona

WHAT'S OUR STORY?



LASTING CHANGES

Our goal is to create long-lasting changes by addressing the underlying causes of problems.



Most people have heard the story of the “leaky pipe,” where one person keeps replacing the buckets underneath the leak, but never thinks to replace the pipe. Or, the “ogre story” of a village that finds babies floating down the river and organizes a massive community effort to rescue the babies, but never sends anyone “upstream” to find out how babies are getting into the river.

Often efforts to help those in the community mirror these approaches – focusing exclusively on the immediate need, without resources to go “upstream” and solve the problem. Figuring out how to fix the pipe rather than continuously replacing the bucket is critical to the challenge of investing community and charitable resources in the most effective, compassionate manner.



PARTNERSHIP

The most important resource we have is people - those whom we serve and all of us who volunteer, who work, who invest, and who care about making long-term change in community conditions.

We are Active Community Investors!



**United Way
of Northern Arizona**

Vision - Who We Are

We work to build a community in which each person:

- Is a positive influence on others
- Chooses to contribute to the community in a manner reflective of their culture
- Becomes the person they want to be

Mission - What We Do

Improving lives by mobilizing communities to make lasting changes in community conditions.

WHY UNITED WAY OF NORTHERN ARIZONA (UWNA)?



- ✓ UWNA focuses on results. Partnering with individuals, business, government and other nonprofit organizations, United Way addresses the most critical human issues and works to bring about lasting changes where you live and work.
- ✓ UWNA maximizes your investment. We bring the community together to improve lives by combining your contribution with others and strategically investing in results-driven programs available for you, your friends, family, co-workers and neighbors throughout Northern Arizona.
- ✓ UWNA is more than an efficient fundraising organization, United Way is different from any other nonprofit in our community. We serve as a convener, collaborator, educator and leader in bringing about positive changes that impact our entire community.

ADVANCING THE COMMON GOOD

The process for determining our new strategy began in 2005, when the United Way National Professional Council Metrics Task Force was established to help United Way measure its impact in communities and as a national system.

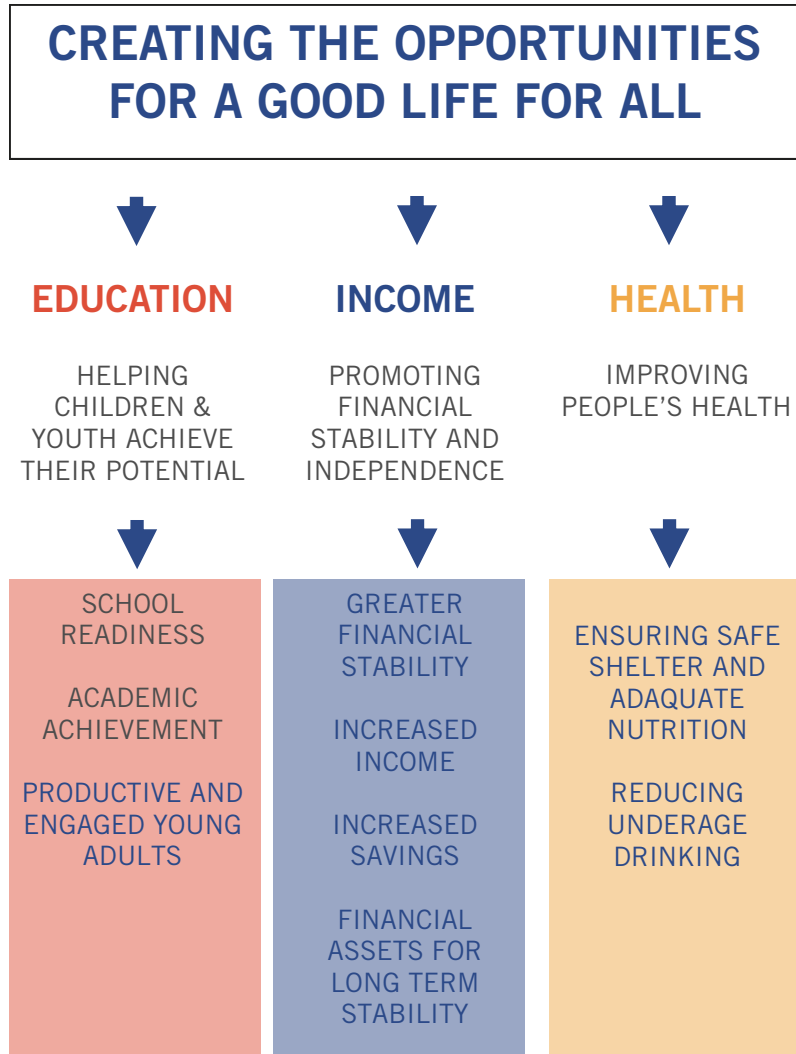
One of this group's first accomplishments was to identify a set of indicators in three broad areas: helping children and youth achieve their potential, promoting financial stability and independence, and improving people's health.

But a few key questions remained. Among them, what does it all add up to? And, how could we communicate this idea in a way that re-ignites a movement?

Thus began a year of rigorous communications research among local United Way leaders, investors and key supporters from the corporate and nonprofit sectors.

Advancing the common good is less about helping one person at a time and more about changing systems to help all of us. It's the idea that we are all connected and interdependent; the idea that we all win when a child succeeds in school, when families are financially stable, and people are healthy.

Presenting LIVE UNITED, an invitation to advance the common good the United Way, by focusing on EDUCATION, INCOME and HEALTH.



THE EXPERIENCE

The first time I saw “it” I was at the grocery store. There’s this guy wearing a plain white shirt with LIVE UNITED across the front. Cool shirt, I thought. On the way home, I’m waiting for the bus and see it again. INFLUENCE THE CONDITION OF ALL. LIVE UNITED. Now I get it.

You know how you see something once and then you start seeing it everywhere? That’s what happened. Every time I turn around, LIVE UNITED: on the ATM, on my company website, on the radio. Made me think. How do I LIVE UNITED?

A couple of weeks go by and I get an email from my friend. “Help working families apply for a tax credit – LIVE UNITED.” I’m good with numbers. So I go to the website and sign up. The first lady I assist with taxes was a grandmother. She’s working and taking care of three grandkids at the same time. I could tell they’re barely getting by; you should have seen her eyes when I told her how much she’d be getting back this year.

After the program, United Way was pretty good about staying in touch, mostly by email. I got a thank-you, a couple progress reports, and more opportunities to pitch in. Now I LIVE UNITED, too.



HOW I LIVE UNITED



Kimberly Ott –

United Way of Northern Arizona Chair

Assistant to the City Manager for Communications
City of Flagstaff

"I first became involved with UWNA in the late 80's as a volunteer. I made very little money so using my communication skills was the best I could do to get the word out about how important and critical it is that we all do what we can to help others in need. I have since run a campaign, joined the Board of Directors and now serve as the Chairperson...and of course give to UWNA through payroll deduction.

Working with UWNA and many of the partners allows me to see the incredible work that is happening and how many people are quietly dedicating their time and/or money to help others. At times it is so inspiring that it leaves me speechless (which for those of you that know me this is hard to do). It also makes me want to do more...and give more...and as importantly tell more people about United Way of Northern Arizona.

I have learned so much since starting as a volunteer. You don't have to have a lot of money...you can give some of your time. If you don't have a lot of time...give a little money...you'd be surprised about how far and how much good can come from even a small donation.

I hope you can....I hope you will...**LIVE UNITED!**"

**HOW TO
LIVE UNITED.
JOIN HANDS
OPEN YOUR HEART
LEND YOUR MUSCLE
FIND YOUR VOICE
GIVE 10% GIVE 100%
GIVE 110%
GIVE AN HOUR
GIVE A SATURDAY
THINK OF WE BEFORE ME
REACH OUT A HAND TO ONE AND
INFLUENCE
THE CONDITION FOR ALL.**



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

LIVE UNITED™ 
United Way
of Northern Arizona

1515 EAST CEDAR AVENUE, SUITE D-1, FLAGSTAFF, AZ 86004
PH: 928-773-9813, FX: 928-773-9814
WWW.NAZUNITEDWAY.ORG

HOW TO RUN YOUR CAMPAIGN



1. SET YOUR CAMPAIGN GOAL

Company Name: _____

BASED ON THE 2008 CAMPAIGN:

_____ 2008 Number of Employees
_____ 2008 Number of Donors
_____ Employee Dollars (**excluding Special Events**)
_____ Average Gift
_____ % Increase over 2007 Campaign

If we **increase the average** gift to \$_____ while keeping the **number of donors the same**, we would raise \$_____ **dollars**.

OR

If we **increase the number of donors** to _____ while keeping the **average gift the same**, we would raise \$_____ **dollars**.

OR

If we **increase the average gift** to \$_____ and **increase the number of donors** to _____, we would raise \$_____ **dollars**.

2009 GOAL RECOMMENDATION:

_____ 2009 Number of Employees
_____ 2009 Number of Donors
_____ Employee Dollars (**excluding Special Events**)
_____ Average Gift
_____ % Increase over 2008 Campaign

2. DEVELOPING YOUR 2009 CAMPAIGN TIMELINE

KEY CAMPAIGN PLANNING ACTIVITIES

ACTIVITY	DATE	TIME	PLACE
Campaign Kickoff			
Meet with United Way Staff			
Begin Committee Recruitment		N/A	N/A
First Committee Meeting			
Begin Team Leader Recruitment		N/A	N/A
Team Leader Training			
Leadership Giving Campaign			
Announce Campaign Results to Company			
Return copy of Pledge Forms and Campaign Report to United Way of Northern Arizona			
Recognition Event			

EMPLOYEE MEETINGS

DATE	TIME	PLACE	DEPT/ DIVISION

SPECIAL EVENTS

DATE	TIME	PLACE	DEPT/ DIVISION
Thank you event			

3. CAMPAIGN COORDINATOR REQUEST OF SUPPLIES 2009 CAMPAIGN

Campaign Coordinator: _____

Company: _____

Address: _____

Phone Number: _____ Fax Number: _____

E-Mail Address: _____

Number of Employees: _____

Number of Pledge Forms: _____ English _____ Spanish

Automatic Electronic Payment Form: _____

Pledge Envelopes: _____ (1 per 50 employees)

Corporate Pledge Form: _____

United Way of Northern Arizona Community Impact Flyer: _____

Number of Lapel Pins: BRASS _____ STICK-ON _____

United Way Posters: _____ Tracking Thermometers: _____

Little Book of Fun Ideas: _____ Balloons _____

Please Return Via Fax to 928-773-9814
Attention: Samantha Cowan



4. RECRUIT YOUR CAMPAIGN COMMITTEE

Take some of the campaign weight off your shoulders. Get more people involved and share the experience! For companies smaller than 50 employees, we suggest recruiting a campaign vice chairman to help you. For larger companies, recruiting a committee is generally the best approach. **Committee Members** will help you plan and implement the campaign. Make sure to include representation from key departments (including labor) and assign areas of responsibility. Here are some suggestions for subcommittees and roles that they can play:

✓ **Publicity/Promotions**

- Develop theme and decorate accordingly
- Organize events like a campaign kickoff
- Get the LIVE UNITED message out – EDUCATE! Maximize the use of newsletters, e-mail, internet, etc.

✓ **Summit Society**

- Develop a targeted “Ask” to employees who have in the past made an investment of \$500 or above
- Hold separate meeting(s) prior to general campaign kickoff
- Work with the designated Summit Society Chair to offer support
- Include in your campaign:
 - CEO presence and endorsement
 - United Way speaker(s)
 - Employee testimonial (if available)
 - Helping the Working Poor for a tax credit

✓ **Employee Meetings**

- Ensure all employees are scheduled to attend a meeting
- Secure speakers for employee meetings though United Way, employee testimonials
- Have the right person make the “Ask”

✓ **Incentives**

- Solicit incentives for giveaways
- Determine how they will be used (e.g., early pledge form return, attending meetings, etc.)
- Publicize winners

✓ **Pledge Forms/Tracking**

- Personalize forms (e.g., name, department, phone number, etc.)
- Ensure 100% contact by distributing and tracking forms
- Report campaign results to employees and to United Way

✓ **Thank You**

- Hold a thank you event
- Send a personalized note
- Be creative and have fun!

5. ASSIGN 2009 COMMITTEE MEMBERS

Number of committee members your campaign needs : _____

ASSIGNMENT	NAME	PHONE NUMBER
Summit Society Chair		
Publicity Chair		
Incentives Coordinator		
Employee Meetings Coordinator		
Pledge Forms/ Tracking Coordinator		
Recognition Coordinator		

6. RECRUIT TEAM LEADERS

Team Leaders will help you facilitate meetings, distribute and collect pledge forms, and make the “Ask”

- ✓ Recruit one Team Leader for approximately every twenty employees
- ✓ Committee members may also serve as Team Leaders, depending on company size

Total number of employees in your company _____ (divided by) 20 = number of Team Leaders needed _____.

DEPARTMENT, DIVISION, LOCATION, SHIFT, CALL CENTER AREA, ETC.	NAME	PHONE NUMBER

7. TRAIN YOUR COMMITTEE AND TEAM LEADERS

For best results, partner with your United Way representative in training your Committee and Team Leaders. Depending on the size of your company, you may need to hold more than one training session.

8. SECURE CAMPAIGN INCENTIVES

Incentives can help you increase both fun and effectiveness of your campaign. Look within your company and to outside businesses and vendors. You will be amazed at what you find, and you do not always need a budget to make this happen!

- ✓ Ask your United Way representative about the best way to use your incentives
- ✓ Ask management and vendors to contribute incentives
- ✓ Ask fellow employees to contribute incentives
- ✓ Ask your United Way representative for the United Way campaign catalog
- ✓ Leverage incentives by tying them to participation and attendance
- ✓ Create incentive packages (e.g., combine movie tickets, dinner for two and baby-sitting money for a “Night on the Town” package)

WHERE TO FIND INCENTIVES

Inside your company:

VENDOR/ INCENTIVES	FELLOW EMPLOYEE/ INCENTIVES	MANAGER/ INCENTIVES

Outside your company:

VENDOR/ INCENTIVES	FELLOW EMPLOYEE/ INCENTIVES	MANAGER/ INCENTIVES

SAMPLE INCENTIVE LETTER FOR VENDORS OUTSIDE OF YOUR COMPANY

Date

Business Name

Address

City, State Zip

Dear Community Relations Manager/ Business Owner,

Improving our community takes teamwork. (Your company name) is currently planning our annual giving campaign through United Way of Northern Arizona, and we are excited to reach our fundraising goal and do our part in helping improve the lives of people in our community. We are asking your company (Business name) to play a part by providing fun and exciting incentives to complement our efforts.

A donation of (goods or services requested) will be used as incentives to encourage our employees to invest in our community through United Way. (Your Company Name) is proud to have a strong heritage of community support, and this year the needs are greater than ever. That is why we are partnering with United Way and businesses like yours (Business Name) who are working together to make a difference.

Through a unique approach of investing in quality local programs, United Way of Northern Arizona is working to create long-lasting and measurable changes that improve the quality of life for struggling individuals, families and children across Northern Arizona. By partnering with us to support our annual campaign, your company (Business Name) can play a crucial and visible role in advancing the common good; and together, we can each do our part to inspire hope for a better tomorrow.

Thank you for your support.

Sincerely,

Employee Campaign Manager

9. CAMPAIGN IDEAS AND THEMES

FUN EVENTS:

Casual Day
 Softball/Volleyball Tournament
 Golf Tournament
 Bake Sale
 Executive Dunk Tank
 Silent Auction
 Management Services Auction
 Auction Premier Parking Space
 Sell Popcorn and Drinks
 Invite Agency Speaker to Speak during Lunch
 Company Picnic/Employee Cook Out
 Ice Cream Social
 Pizza Party
 Pancake Breakfast
 Beach Party
 Carnival
 Office Olympics
 Halloween Costume Contest
 Baby Picture Guessing Contest
 Children's Drawing Contest
 Campaign Slogan/Theme Contest
 Voice Mail/E-Mail Contest
 Cubicle Decorating Contest
 Chili Cook-Off
 Ugly Tie/Ugly Earring Contest
 Funniest Home Videos
 Dress-Up Day
 Department Penny Wars
 Wall of Fame

INCENTIVES:

Paid time off
 Casual Day
 Jean Friday
 Lunch with CEO
 Reserved/Covered Parking
 Tickets to Game/Movie
 Grocery Certificate
 Company T-Shirt
 Dinner for Two
 Hotel Getaway
 Gift Certificates
 Flowers each Month for a Year
 "Sleep-In" Pass
 "Leave Work Early" Pass
 Airline Tickets
 Trophy
 Extra Half Hour for Lunch
 Split the Pot 50/50
 Homemade baked goods
 Company shirts, pens, etc.
 Candy
 Gas Cards

LIVE UNITED THEMES:

Reach out a hand to one and influence the condition of all...LIVE UNITED
 It takes everyone in the community working together to create a brighter future
 LIVE UNITED
 Together, we can accomplish more than any single group can on its own...LIVE UNITED
 Be Part of the Change...LIVE UNITED
 Working Together to Advance the Common Good...LIVE UNITED
 Help United Way Create Lasting Changes in Our Community...LIVE UNITED
 Together, United, we can inspire hope and create opportunities for a better tomorrow.



10. CAMPAIGN KICKOFF... CONDUCTING YOUR GENERAL CAMPAIGN

HOLD A CAMPAIGN KICKOFF AND “FUN” RAISERS TO CREATE AWARENESS

The main purpose of themes and special events is to have FUN, bring awareness to your campaign and unite your employees for a special cause.

Consider:

- ✓ Developing a theme and tag line to promote the campaign
- ✓ Holding a rally, BBQ, or carnival
- ✓ Using special event fund-raisers AFTER YOUR PLEDGE DRIVE to have fun and add to your campaign

CASE FOR GIVING

UNDERNEATH EVERYTHING WE ARE, UNDERNEATH EVERYTHING WE DO, WE ARE ALL PEOPLE. CONNECTED, INTERDEPENDENT, UNITED. AND WHEN WE REACH OUT A HAND TO ONE, WE INFLUENCE THE CONDITION OF ALL. THAT'S WHAT IT MEANS TO **LIVE UNITED.**



UNITED WAY MULTIPLES THE IMPACT OF YOUR CONTRIBUTION.

- ✓ Your investment in United Way of Northern Arizona has an even greater impact because it is leveraged to bring grants and other contributions into our community.
- ✓ Last year, United Way of Northern Arizona leveraged more than \$1.5 million for young children and families in need.

Advancing the Common Good: Creating Opportunities for a Better Life for All

Everyone deserves opportunities to have a good life: a quality education that leads to a stable job, enough income to support a family through retirement, and good health.

That's why United Way of Northern Arizona's work is focused on the building blocks for a good life: Education, Income & Health.

United Way of Northern Arizona - Advancing the Common Good Outcomes 2008

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

EDUCATION: Helping Children & Youth Achieve Their Potential	INCOME: Helping Families Become Financially Stable & Independent	HEALTH: Improving People's Health
<p>KinderCamp, Rodel, Quality Improvement Grants:</p> <ul style="list-style-type: none"> ✓ 385 youth received one-to-one mentoring. 100% of participants did better in school and were promoted to the next grade level. 80% of participants demonstrated improved attitude toward school. ✓ 543 child care providers participated in early childhood trainings. Participants reported learning how to create a better environment for children at their center. ✓ 26 low-income families received affordable child care. ✓ 780 youth attended daily after school programs offering a safe environment with snacks, homework help, and mentoring. 	<p>VITA, IDA and Support Neighborhood Associations:</p> <ul style="list-style-type: none"> ✓ 69 individuals received free legal services, recovering \$16,901 in assets or avoided expenses for low-income residents. ✓ 1,983 individuals and 277 employers received employment and educational related assistance. ✓ 253,074 meals were served to homeless, seniors and the working poor. ✓ 4,642 individuals received referrals to community services for food, shelter, health care, and other basic needs. 	<p>Reduce Underage Drinking:</p> <ul style="list-style-type: none"> ✓ 975 youth gained increased awareness of the consequences of the use of alcohol, tobacco, and other drugs. Post-survey results indicated 75% of the students responded they would not ride with someone under the influence of drugs or alcohol. ✓ 50 Native American elementary-aged youth received substance abuse education and prevention. Post-survey results indicated 75% of participants gained knowledge of alcohol, tobacco, and other drug issues. ✓ 343 victims of domestic violence received safe shelter, food, clothing, and support services. One resident, who identified herself as a domestic violence survivor, said she overcame fears, accomplished goals, and built self esteem. Her children were also helped, showing improved attitudes and grades, and an ability to laugh again.

**Your United Way contribution is an investment in our community.
Together, we can get results that no one can accomplish alone,
getting to the heart of problems and creating lasting changes in people's lives and our community.**

11. SCHEDULE A SPEAKER WITH UNITED WAY

Including a speaker in your employee presentations is like bringing community services to your office. United Way speakers share a first-hand account of the impact each donor's contribution is having on people who use the United Way funded programs. You may even have a potential speaker among your employees. One of your co-workers may have a success story that they would be willing to share with others.

Please contact your United Way representative to schedule speaker.

- ✓ Generally two business days notice is needed in order to fill your request for a United Way speaker. (Please provide additional time whenever possible.)
- ✓ For a general employee meeting, a minimum attendance of 25 people is suggested.
- ✓ For a Leadership meeting, a minimum attendance of 15 people is suggested.
- ✓ Meetings should be at least 30 minutes to allow time for United Way speaker's presentations.

12. CONDUCT EMPLOYEE MEETINGS WITH YOUR UNITED WAY REPRESENTATIVES

Holding employee meetings is the number one way to educate your employees about the importance of their participation in United Way. The most effective way to hold these meetings is to tag them onto a regular staff meeting.

Proven methods/techniques include:

- ✓ Promote the campaign at least one week prior to your meeting
- ✓ Invite your United Way representative and a speaker to participate
- ✓ Personalize pledge forms
- ✓ Make your own donation before asking others to give
- ✓ Use incentives to encourage attendance (e.g., food, giveaways, etc.)
- ✓ Decorate the room to make your meetings more fun
- ✓ Provide pens for people to complete pledge forms at the meeting
- ✓ Ask for a specific amount based on your goal
- ✓ Offer incentives for turning in a pledge form and participating in employee meetings
- ✓ Encourage all employees to turn in their completed pledge form
- ✓ Strive for 100% contact

LIVE UNITED™



TODAY'S DATE: _____
UWNA STAFF: _____
NAME OF UWNA REP AT MEETING: _____

**UNITED WAY OF NORTHERN ARIZONA
SPEAKER REQUEST FORM**

ALL INFORMATION MUST BE COMPLETED TO PROCESS REQUEST

COMPANY: _____

CONTACT NAME: _____

MAILING ADDRESS: _____

PHONE/EXT: _____ **FAX NUMBER:** _____

EMAIL ADDRESS: _____

COMPANY TYPE (circle one):

- | | | | |
|---------------|---------------|-----------|--------------|
| SECC/ CFC | Construction | High Tech | Professional |
| Public Sector | Assembly Line | Education | Other |

IF OTHER PLEASE EXPLAIN: _____

DATE OF MEETING: _____ **START TIME:** _____ **AM/ PM**

FINISH TIME: _____ **AM/ PM**

AMOUNT OF TIME AVAILABLE FOR SPEAKER: _____

ADDRESS OF MEETING (include room, floor, bldg, etc.): _____

MAJOR CROSS STREETS: _____

SPECIAL INSTRUCTIONS (i.e. Parking, security, etc.): _____

TYPE OF MEETING (circle one) :

- | | | | |
|------------|---------|---------|------------------|
| LEADERSHIP | KICKOFF | GENERAL | EMPLOYEE MEETING |
|------------|---------|---------|------------------|

AUDIENCE SIZE: _____

COMPANY REPRESENTATIVE AT MEETING (i.e. Person speaker will ask for): _____

SPECIAL REQUESTS (i.e. agency/topic preferences: Spanish speaking etc.): _____

PLEASE FAX REQUEST TO UNITED WAY OF NORTHERN ARIZONA TO
928.773.9814 AT LEAST 48 HOURS IN ADVANCE. THANK YOU.

Here is a standard 30 minute meeting agenda. Work with your United Way representative to customize the agenda to meet your needs.

Sample Meeting Agenda (Ideal time is 30 minutes)

- ✓ **Opening Remarks** – *Employee Campaign Manager/Team Leader*
 - Explain purpose of the meeting
 - Discuss results from previous year
 - Discuss why you support United Way
 - Have incentives
- ✓ **Understanding United Way** – *United Way representative*
 - The value of giving to United Way of Northern Arizona
- ✓ **United Way Speaker / Testimonials** – *Provided by United Way or fellow Employees*
- ✓ **Pledge Form Review** – *Employee Campaign Manager/Team Leader/ United Way representative*
- ✓ **The “Ask”** – *Employee Campaign Manager/Team Leader*
- ✓ **Closing Comments** – *Employee Campaign Manager/Team Leader/ United Way representative*
 - Q&A
 - Thank everyone for their attention and attendance
- ✓ **Collect Pledge Forms** – *Employee Campaign Manager/Team Leader*
 - Collect ALL pledge forms to ensure 100% contact and aid in tracking forms
 - If a person chooses not to complete a pledge form at the meeting, set a time to collect it
 - Thank and recognize participants
- ✓ **Follow-up in person with those who missed the meeting** – *Employee Campaign Manager/Team Leader*
 - Double check that anyone on vacation or leave of absence was asked to give
 - Send e-mail or voice mail for forgotten pledge forms

Concerns and Objections you might hear at a meeting

You may, on occasion, encounter people who object to contributing to United Way. Keep in mind that objections are a natural part of the campaign and offer you an opportunity to present more information.

Here are some insights into the psychology of objections and suggestions for handling them:

Objections are not personal.

Remember, they are not directed at you.

Objections are often based on incorrect information.

Try to identify the real issue.

Show sympathy.

Listen carefully and show your concern. This does not mean you agree, but that you care about the concern.

Do not argue.

Instead, offer information about the many ways United Way helps people, or offer to discuss the issue further after the group meeting.

Encourage the objector to talk.

Allow the person voicing the objection an opportunity to expand on it at length. An insecure, illogical or poorly thought-out objection will fail on its own.

Relax and be yourself.

You have ideas to present, so be straightforward in your presentation. Asking for someone's participation or gift is not a "win/lose" situation.

Do not be afraid to say you do not know.

Let those with questions know you will get back to them with an answer. Tell them they can call United Way at 773-9813 or visit our website at www.nazunitedway.org.

Remember! Education not Coercion.

The most responsive donors are those who have an opportunity to become informed and involved. Experience clearly shows that coercion creates animosity, hinders communication and understanding, and can lead to decreased support.

Your United Way contribution is an investment in our community. Together, we can get results that no one can accomplish alone, getting to the heart of problems and creating lasting changes in people’s lives and our community.

SUGGESTED CONTRIBUTION GUIDE

United Way of Northern Arizona believes that giving is a personal decision. The choice to give and how much you choose is your decision alone. Every pledge of any amount is important, because it helps improve lives and builds a stronger community. United Way of Northern Arizona thanks you for your investment.

The following guide provides suggested giving levels by salary range on a monthly basis; your company’s pay frequency will determine the actual results on an employee’s paycheck.

ANNUAL SALARY	ONE HOUR PAY/MTH	TWO HOURS PAY/MTH	1% OF PAY/MTH	2% OF PAY/MTH
\$20,000	\$9.62	\$19.24	\$16.67	\$33.34
\$25,000	\$12.00	\$24.00	\$20.84	\$41.68*
\$30,000	\$15.00	\$30.00	\$25.00	\$50.00*
\$40,000	\$20.00	\$40.00	\$33.33	\$66.67*
\$50,000	\$25.00	\$50.00*	\$41.67*	\$83.34*
\$60,000	\$30.00	\$60.00*	\$50.00*	\$100.00*
\$70,000	\$35.00	\$70.00*	\$58.33*	\$116.67*
\$80,000	\$40.00	\$80.00*	\$66.67*	\$133.33*
\$90,000*	\$45.00*	\$90.00*	\$75.00*	\$150.00*
\$100,000*	\$50.00*	\$100.00*	\$83.33*	\$166.66*

* This monthly contribution qualifies for Summit Society, a contribution of \$500.00 or more, which includes additional recognition of each active community investor.

For the same cost as one lunch per week, you can invest in your community at a leadership level creating lasting changes in people’s lives and building a stronger community.

\$9.69 per week x 52 weeks =
\$504 annual

SUMMIT SOCIETY

Conducting a Leadership Giving Program is an integral part of your workplace campaign. Leadership giving allows your employees to make a greater impact on the lives of people and sets your organization apart as a leader in our community. Benefits of Leadership Giving to your organization campaign are significant.

WHAT IS SUMMIT SOCIETY?

United Way of Northern Arizona's Summit Society is comprised of active community investors who give \$500 or more annually. The strength of the Summit Society lies in each member's belief that the Northern Arizona community is worthy of significant personal investment. Their generosity reflects a strong commitment to the mission of United Way of Northern Arizona, "Improving lives by mobilizing communities to create lasting changes in community conditions." The Summit Society has seen steady growth in membership since it was founded in 1992. In 2008, Summit Society had 580 members.

WHY IS IT IMPORTANT?

Behind every United Way contribution is a very personal and very powerful commitment to addressing human needs and creating long-term positive changes in our community. Summit Society Members set a standard of charitable giving in our community, and motivate, by example, those who have the potential to increase their level of commitment.

DONOR BENEFITS

In addition to the personal satisfaction of making a significant and lasting impact on the Flagstaff community, other benefits of the Summit Society include:

- ✓ Your name listed in an annual Summit Society Publication (with your permission)
- ✓ Recognition of your generosity from professional colleagues, company management, neighbors, friends and family
- ✓ An invitation for you and your guest to a complimentary Summit Society Reception
- ✓ Invitations to attend other United Way of Northern Arizona events throughout the year

SUMMIT SOCIETY TIPS FOR THE CAMPAIGN COORDINATOR

How can it help your campaign?

- ✓ It raises community investments made for your campaign
- ✓ It gives people a goal to strive for
- ✓ Provides a leadership aspect to the campaign
- ✓ Recognition

STRENGTHENING YOUR LEADERSHIP GIVING

- ✓ Select a manager who is able to serve as a Leadership Giving Chair on your campaign committee
- ✓ Set a goal for Leadership Giving
- ✓ Integrate Leadership Giving "Ask" into **ALL** aspects of your campaign in order to reach a broad audience

STRENGTHENING YOUR LEADERSHIP GIVING (CONT.)

- ✓ Include current and potential Leadership Givers from your organization in Leadership Giving “Ask” meetings
- ✓ Hold smaller, more intimate functions to educate potential active community investors regarding unique benefits of Leadership Giving – including special recognition events, volunteer opportunities, and year round communication
- ✓ A great way to give a heads-up to managers/directors is to hold a United Way presentation at a managers/ directors meeting prior to the campaign. This is an opportunity to ask them to join the Summit Society

WHO TO APPROACH

- ✓ Anyone who has been given a hand up through a United Way service
- ✓ Management (Upper Management for higher levels of giving)
- ✓ Past donors who are close to a higher level of giving
- ✓ Company Owners

HOW TO GET PEOPLE TO JOIN OR MOVE UP A LEVEL

- ✓ “ASK!!!”
- ✓ Educate donors on United Way’s impact and results
- ✓ Educate donors on various giving levels
- ✓ Have company leaders lead by example (Explain to them why it is important for them to give, and let them explain to others why it is important to give at the Summit Society level)
- ✓ Host a Summit Society Breakfast (Summit Society Members invite a person that is not currently giving, but could be, or have Company Leadership explain why it is important to continue to have personal donations grow as years go by)
- ✓ “Ask me about the 1924.” \$19.24 every pay period for 26 pay periods equals \$500.24
- ✓ Speakers help motivation

TOCQUEVILLE SOCIETY	\$10,000 & ABOVE
PINNACLE	\$5,000-\$9,999
HUMPHREY’S PEAK	\$2,500-\$4,999
AGASSIZ PEAK	\$1,500-\$2,499
FREMONT PEAK	\$1,000-\$1,499
DOYLE PEAK	\$750-\$999
KENDRICK PEAK	\$500-\$749

13. CAMPAIGN WRAP-UP

REPORT YOUR RESULTS AND WRAP UP THE CAMPAIGN

- ✓ Report your campaign results to United Way including returning copies of pledge forms or provide an electronic file
- ✓ Please provide names and home addresses for all donors so that United Way can acknowledge gifts to those who need them (Helping the Working Poor)
- ✓ Please provide emails addresses for all donors

COLLECT PLEDGE FORMS IMMEDIATELY FOLLOWING A MEETING OR SET A DEFINITE TIMELINE

- ✓ Most companies strive to get 100% of their pledge forms returned as a way to ensure that everyone has received a pledge form and had an opportunity to make an informed decision about giving

TABULATE RESULTS AND COMPLETE UNITED WAY REPORT ENVELOPE(S)

SWEEP UP

- ✓ Look for all missing pledge forms
- ✓ Double check that anyone on vacation or leave of absence was “Asked”
- ✓ Send e-mail or voice-mail for forgotten pledge forms

SAY THANK YOU

- ✓ You can never say thank you enough! Please remember to:
- ✓ Communicate results to your entire company
- ✓ Announce prize winner(s)

HOLD A COMMITTEE DEBRIEFING WITH UNITED WAY REPRESENTATIVE

COMPLETE UNITED WAY’S CAMPAIGN SURVEY

ATTEND UNITED WAY EVENTS

PARTICIPATE IN YEAR-ROUND ACTIVITIES

Help us keep the message going throughout the year so that United Way’s Campaign is not seen as a once a year event. Here are a few ideas on what you can do:

- ✓ Invite a United Way speaker to a company event
- ✓ Establish a “New Hire” program and include United Way information in your company’s new employee orientation process
- ✓ Display United Way’s year-round posters and share how contributions are improving lives

RESOURCES



10 Steps for a Successful Campaign:

1. Get the CEO/President/Director involved!
2. TEAM— Together Everyone Achieves More.
3. We are here to serve you!
4. The more you know the better your campaign.
5. You CAN make a difference in the community!
6. Campaigns are a great way to bring people together for a great cause.
7. Spread the word and the good will.
8. Put FUN back into FUNdraising!
9. Share your successes.
- 10. Thank you for a job well done and for helping our community LIVE UNITED.**

MATERIALS AVAILABLE

Materials listed below are available free-of-charge through United Way of Northern Arizona. Please contact your United Way representative for materials.

- ✓ **PLEDGE FORM – 1 per employee**
Details United Way’s giving options. Choose pledge type: dollar amount per pay period, hours per pay period/percent of annual salary.
- ✓ **UNITED WAY OF NORTHERN ARIZONA COMMUNITY IMPACT FLYER**
A flyer describing benefits of investing in our community through United Way with a listing of United Way Partners.
- ✓ **REPORT ENVELOPES – 1 per 50 pledge forms**
Envelopes used to submit your employees’ and corporate contributions.
- ✓ **POSTER**
Visual imagery and message conveying the Campaign theme: **LIVE UNITED**
- ✓ **POSTERS/THERMOMETER**
Posters used to chart your campaign’s progress and to announce total dollars raised.
- ✓ **BALLOONS**
- ✓ **PINS – 1 per donor**
Lapel pins with the United Way logo. Available in gold-tone or colorful stick-on styles.

The image shows a 'United Way Pledge Form' titled 'LIVE UNITED'. The form is divided into four main sections: 1. MY INFORMATION, 2. PLEASE CHOOSE HOW YOU WANT TO INVEST IN YOUR COMMUNITY, 3. PLEASE SELECT YOUR GIVING OPTION, and 4. PLEASE SIGN AND DATE. Section 1 includes fields for name, address, phone, and email. Section 2 offers options for 'COMMUNITY INVESTMENT FUND' and 'Other Ways to Give'. Section 3 provides choices for 'Easy Payroll Deduction' (weekly, bi-weekly, monthly, quarterly, or annual) and 'Other Ways to Give' (check, credit card, or cash). Section 4 includes a signature line and a date field. The form also features the United Way logo and contact information for Northern Arizona.

Check out the United Way catalog for a variety of incentive items available for purchase! www.unitedwaystore.com

STRATEGIES TO INCREASE AVERAGE GIFT

	CONTINUE DOING	IMPROVE	ADD THIS YEAR
Visible Organizational Leadership Support			
1. Personal solicitation of top management for Leadership gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Establish challenge and matching gift program for Leadership Givers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understandable and Measurable Goals			
1. Set goals for increasing average gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Set goals for Payroll Deduction participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Campaign Team			
1. Recruit Leadership Givers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Build continuity through leadership succession	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Include United Way staff in your meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Train members and team leaders on effective campaign techniques	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written Campaign Plan			
1. Engage others in developing your plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Critique last year's campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Focus on areas of maximum opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Build a budget to support your plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Gain top management commitment to your plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaign Meetings and Activities			
1. Use special events to promote the campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Have a United Way speaker at employee meetings and activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Hold employee meetings followed with personal solicitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership Giving Program – Summit Society			
1. Utilize personalized pledge forms for various groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pledge Processing			
1. Develop a pledge processing tracking system to help manage your campaign, report results and recognize contributors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaign Communication and Education			
1. Communicate year-round based on employee interests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Promote "One-to-One, Peer-to-Peer" solicitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Report progress during campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Use personal, video taped and printed employee testimonials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaign Recognition			
1. Tie recognition programs to goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Hold special meetings to recognize outstanding performers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please list the numbers of your Average Gift Building activities for this year.

Continue Improve Add

Top 3 Average Gift Building Strategies

1. _____
2. _____
3. _____

FREQUENTLY ASKED QUESTIONS:

Q. WHAT IS UNITED WAY OF NORTHERN ARIZONA?

A. United Way of Northern Arizona is a local non-profit organization that brings our community together and focuses resources on the most critical human care needs in Northern Arizona. By partnering with government, business, the faith community, education, non-profits and individuals, we're able to monitor the needs of our community and respond quickly as issues and opportunities arise. As a convener, collaborator, funder and leader in addressing health and human service issues, United Way of Northern Arizona fulfills a unique role in making our community a better place. And thanks to the generous support of people throughout Northern Arizona, we're helping to improve lives every day.

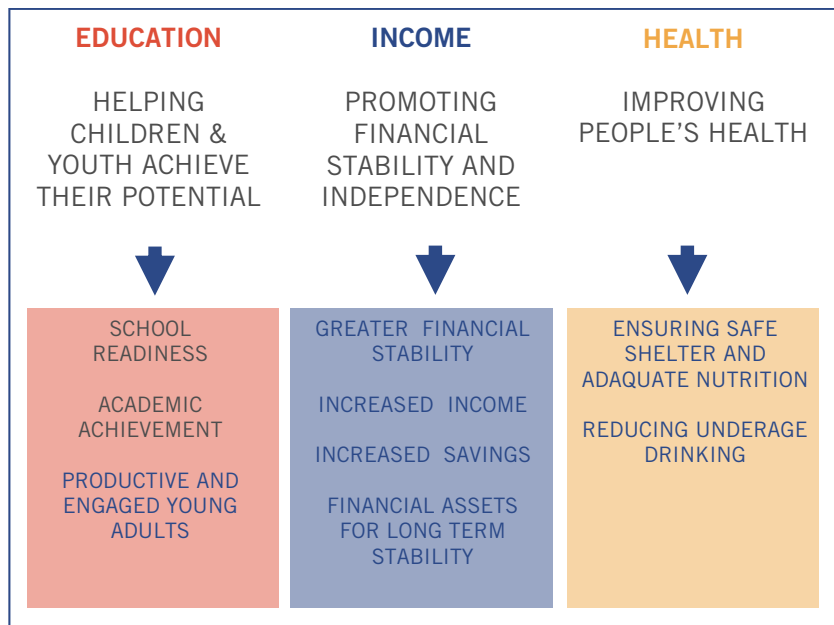
Q. WHY SHOULD I GIVE TO UNITED WAY?

A. When you give to United Way, you help provide solutions to the most critical issues in our community. You become part of a coordinated, community-wide effort that brings about changes that matter most where you live and work. United Way of Northern Arizona maximizes your gift by combining your contribution with others and strategically investing in results driven programs and initiatives that improve lives and change community conditions.

Q. WHY GIVING TO UNITED WAY OF NORTHERN ARIZONA IS THE BEST WAY TO CONTRIBUTE IN OUR COMMUNITY.

A. There are several reasons why your contribution to United Way is the best way to help the most people in our community. These reasons include:

- ✓ Your United Way contribution is an investment in your community, thus you are helping provide solutions to the most critical human needs in our community.
- ✓ Community volunteers carefully review each United Way partner on an annual basis. Their oversight ensures partners adhere to sound fiscal practices and that your contribution is invested in programs that make an impact in our community.
- ✓ When you give through your workplace campaign, your contribution can be spread out over the course of a year through payroll deduction, making it easier for you to be a partner in addressing critical needs in our community
- ✓ Together we can get results that no one can get alone.



Q. WHAT DOES UNITED WAY DO IN ADDITION TO RAISING MONEY?

A. Fundraising is just one part of the immense value United Way of Northern Arizona brings to our community. By partnering with business, government, non-profit organizations, and Individuals together we help improve lives and create sustained change in our community. United Way of Northern Arizona monitors the community's changing needs and focuses on resources to provide quality solutions.

Q. IS UNITED WAY A NATIONAL OR LOCAL ORGANIZATION?

A. United Way of Northern Arizona is a local, non-profit organization. Like the more than 1,400 United Ways across our country, a local volunteer board of directors governs us.

Q. HOW DO I KNOW THAT MY DONATION WILL HELP THOSE WHO NEED IT MOST?

A. A group of dedicated volunteers that range from community volunteers to business leaders carefully monitor community needs, meet with local health and human agencies, review each partner's request for program funding and invests your contribution in programs that improve the most lives.

Q. IS MY UNITED WAY CONTRIBUTION TAX DEDUCTIBLE?

A. Yes, your contribution is tax deductible if you itemize your deductions. You may also qualify for state tax credit by designating a portion of your gift to helping the Working Poor Fund.

Q. HOW IS UNITED WAY OF NORTHERN ARIZONA HELD ACCOUNTABLE ?

A. United Way of Northern Arizona prides itself on being a trustworthy and accountable organization. A volunteer committee of financial experts meets year-round, monitoring the organization's financial position. We maintain high standards of operation and are reviewed each year by an independent auditor, who verifies that our financial statements fairly present the financial position of United Way of Northern Arizona.



WORKING POOR STATE TAX CREDIT



You can help give hope to families and individuals by investing a portion of your United Way contribution in the Helping the Working Poor Priority area; and you could receive up to a \$200 (for single taxpayer) or \$400 (for married, filing jointly) Arizona state tax credit!

In order to take advantage of the Helping the Working Poor state tax credit you must:

- Itemize your charitable contributions on your state tax return
- Establish a baseline year of charitable giving
- Increase your charitable giving over your baseline year
- Direct up to \$200 (for single taxpayer) or \$400 (for married, filing jointly) to United Way's helping the Working Poor priority area
- Provide your name, home address and phone number on your pledge form in order to receive an acknowledgement for your tax records

WORKING POOR STATE TAX CREDIT FAQ'S

Q. WHAT ARE BENEFITS OF GIVING TO HELPING THE WORKING POOR?

A. United Way's helping the Working Poor priority area invests in programs that assist working poor families move from welfare to work and improve their overall standard of living. If you itemize your taxes and give to the Working Poor priority area, you may be eligible for a state tax credit. In order to take advantage of this state tax credit, you will need to establish your base contribution (the amount you gave to charity in 1996 or later) and then you must increase your 2009 contribution over your base contribution. This can be accomplished by directing all or a portion of your increased gift to helping the Working Poor priority area.

Q. WHAT IS THE DIFFERENCE BETWEEN A TAX CREDIT AND A TAX DEDUCTION?

A. A tax deduction is an item that helps determine what your final taxable income will be. A tax credit is applied as a reduction to your final tax liability. In this case, a tax credit comes right off the top of your state tax bill, lowering the amount of money that you will pay.

Q. WHEN IS MY BASELINE YEAR?

A. 1996 is your baseline line year if you itemized charitable contributions on your federal tax return that year. If you did not itemize in 1996, then the first year after 1996 that you itemized your deductions becomes your baseline year. Your baseline year does not change unless you change your filing status.

Q. HOW DO I FILE FOR THE CREDIT?

A. There is a simple form (AZ Form 321) that is included with your state tax filing that you or your accountant will complete. The form is included with materials provided by the State of Arizona to all state tax filers.

Q. IF I DID NOT GIVE TO A CHARITABLE ORGANIZATION LAST YEAR CAN I STILL GET A TAX CREDIT?

A. Your baseline year begins with the first year you itemize your charitable contributions. Once you establish a baseline year, you become eligible for this tax credit the following year. So, if this is your baseline year, you will be eligible for the tax credit in 2009 based on your contribution to the 2008 United Way Campaign.

Q. WHO IS A “QUALIFYING CHARITABLE ORGANIZATION”?

A. The United Way established and certified with the State of Arizona a “Helping the Working Poor Fund” as a qualifying charitable organization. It along with other organizations that provide assistance to the working poor will allow your charitable contribution to qualify for the tax credit.

Q. WHERE WILL THESE FUNDS GO?

A. Contributions to the working poor fund will go to not-for-profit 501(c)3 organizations who provide services for needy families such as medical care, child care, food, clothing, shelter or other assistance that helps individuals meet basic needs. The legislation specifies that eligible organizations spend at least 50% of their budget on basic needs to residents of Arizona. Agencies must be certified by the State of Arizona.

Q. WHAT HAPPENS IF I DON'T OWE TAXES AT THE END OF THE YEAR?

A. The credit reduces your overall state tax income. If the allowable tax credit is more than your tax or if you have no tax, you may carry the unused credit forward for up to the next five (5) years. If you withheld more than what you owed, the credit will result in an increase in your state tax refund.

Q. HOW DO I DOCUMENT MY CONTRIBUTION?

A. United Way will send you an acknowledgement letter confirming your contribution to the “Helping the Working Poor Fund.” This letter along with your copy of the signed pledge form, or cancelled check provides the paperwork needed to document your contribution. These documents are necessary to support your tax credit, so make sure you include your name, home address and sign on your United Way pledge form.

Q. SHOULD I DESIGNATE ALL OF MY UNITED WAY CONTRIBUTION TO THIS FUND CALLED “HELPING THE WORKING POOR”?

A. You have a right to choose where your contribution goes. United Way recommends that you consider giving the increased amount of your gift to the Working Poor fund, while maintaining your previous commitment to United Way’s Community Impact Fund or another Priority Area. In this way, the pool of dollars to other worthwhile programs will remain stable, while also increasing the funds available for helping the working poor.

IMPORTANT NOTE TO DONORS: United Way is not a tax advisor. As with any financial recommendation, contact a qualified tax advisor for expert advice on your specific tax situation.

QUALIFIED PARTNERS FOR WORKING POOR FUNDS 2009

*Flagstaff Chapter

Big Brothers Big Sisters of Flagstaff
BOTHANDS
Catholic Charities Community services
DNA – People’s Legal Services
Flagstaff Family Food Center
Literacy Volunteers of Coconino County
Native Americans for Community Action
North Country HealthCare
Northern Arizona University Senior Corps Program
Northland Family Help Center
St. Mary’s Food Bank Alliance – Flagstaff
Sunnyside Neighborhood Association
The Guidance Center
Teen Wellness Clinic

*Page Chapter

Community Behavioral Health Services
CUDDLE Outreach Ministry
Page Regional Domestic Violence

**Northeast Chapter

Northern Arizona University Senior Corps Program
Salvation Army- White Mountain Outpost
White Mountain Safe House
White Mountain Meals on Wheels
Winslow Council on Aging

* Serving Coconino County

** Serving Southern Apache & Southern Navajo Counties

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LIVE UNITEDTM



**United Way
of Northern Arizona**