



2013

RAPPAHANNOCK UNITED WAY

EMPLOYEE CAMPAIGN COORDINATOR TOOLKIT

DESTINATION: IMPACT

OUR GOAL: More households emerge from poverty and achieve greater financial stability.



A LETTER FROM THE 2013 CAMPAIGN CO-CHAIRS

Dear Ambassadors,

As an Employee Campaign Coordinator, you are an Ambassador for Rappahannock United Way. Ambassadors are essential to the success of our community Campaign. Without you, we could not provide the critical funds needed to support 47 programs at more than 37 local agencies. Whether this is your first time as a coordinator or you are a seasoned veteran, this guide will help you conduct a successful campaign from start to finish.

Thank you for leading your organization's United Way campaign and encouraging others to GIVE, ADVOCATE and VOLUNTEER. Your campaign, along with others throughout our area, will impact the lives of thousands throughout our community. We couldn't do it without you! Thank you for volunteering to be part of the annual Rappahannock United Way Campaign. Together, UNITED, we can inspire hope and create opportunities for a better tomorrow. That is what it means to **LIVE UNITED**.

You can also visit us on the web at www.rappahannockunitedway.org/campaign.html for more tips and tools including sample emails, thank-you letters, and success stories. We also encourage you to be a part of our movement. Friend us on Facebook, and follow us on Twitter @liveunitedruw.

Sincerely,



Ana Garcia Chichester, PhD.

UMW

2013 Volunteer Campaign Chairman



Beth Williams

Hilldrup Moving & Storage

2013 Volunteer Campaign Vice-Chairman

EMPLOYEE CAMPAIGN COORDINATOR TRAINING

Friday, July 26th or Wednesday, July 31st 2013

CAMPAIGN KICKOFF BREAKFAST

Tuesday, August 27th 2013 - 7:30am to 9:00am

DAY OF CARING:

Fredericksburg, Va (Fredericksburg, Stafford & Spotsylvania): Friday, September 27th 2013

Caroline County: Tuesday, October 1st, 2013

King George County: Friday, October 4th, 2013

RAPPAHANNOCK UNITED WAY STAFF:

(540) 373-0041

www.RappahannockUnitedWay.org

CAMPAIGN: Tamara Jones Ext. 309

VOLUNTEER CENTER: Terri Center Ext. 314

WHAT IS A WORKPLACE CAMPAIGN?

A workplace campaign is an organized effort to ask employees to contribute to Rappahannock United Way and programs. Running a Rappahannock United Way employee campaign within your company boosts morale and encourages team-building. These campaigns benefit many programs, employees, and the community by:

- Making it easy for employees to give - through payroll deduction, which is made over the course of a year.
- Maximizing the impact of giving - investing in the Rappahannock United Way Community Impact Fund lets you make one gift while impacting thousands
- Educating employees and organizations about community issues - allowing them to make informed decisions about giving
- Ensuring our community is a better place to live and work - when members of our community are educated, financially stable and healthy, our community will forever be a better place

YOUR ROLE AS EMPLOYEE CAMPAIGN COORDINATOR (ECC)

Objective: To encourage your co-workers to participate in creating community impact by planning, coordinating, and implementing a successful Rappahannock United Way workplace campaign.

RESPONSIBILITIES INCLUDE:

- Attend Employee Campaign Coordinator Training
- Recruit an enthusiastic committee of co-workers to assist in the campaign
- Work closely with RUW staff to develop an effective campaign plan
- Coordinate the distribution and collection of campaign materials
- Coordinate kickoff and recognition events
- Promote the campaign throughout your company
- Conduct a separate leadership giving solicitation meeting (for annual gifts of \$1,000 or more)
- Invite EVERYONE in your company to give
- Encourage volunteerism among your co-workers
- Thank your donors and volunteers
- Publicize your campaign results throughout entire organization
- Complete your campaign by giving United Way your final report
- Evaluate your campaign and make recommendations for next year
- Work with management to obtain a corporate gift
- Provide feedback to RUW staff about how we can support you year-round

BENEFITS OF BEING AN ECC:

- Showcase your leadership skills
- Network with colleagues at various levels of your organization
- Work with management to obtain a corporate gift
- Take an active role in advancing the common good
- Receive RUW training and network with ECCs from other companies





OUR MISSION.

To improve lives by mobilizing the caring power of our community.

OUR VISION.

To become the region's leader in coordinating solutions to human needs and promoting civic involvement.

RAPPAHANNOCK UNITED WAY FOCUSES ON THE BUILDING BLOCKS OF A GOOD LIFE

Rappahannock United Way (RUW) is working to advance the common good by focusing on Education, Income, and Health - the building blocks for a good life. We all win when a child succeeds in school, families are financially stable, and people have good health. Our goal is to create lasting changes that prevent problems from happening in the first place.

WHAT WE DO

At Rappahannock United Way, we focus on advancing the common good by creating opportunities for a better life for all. Advancing the common good is less about helping one person at a time and more about changing the system to help us all. We all benefit when a child succeeds in school, when individuals and families are financially stable, and when people are healthy.

HOW WE DO IT

Rappahannock United Way focuses on Education, Income and Health because they are the foundation for a successful life. RUW, member agencies, community experts, and volunteer teams help to identify the most important community needs and develop impact strategies designed to address the underlying causes. Our funding model ensures collaboration, efficiency, innovation, and accountability. RUW funds more than 47 local programs and has 37 member agencies.

WHY WE DO IT

For almost 75 years, Rappahannock United Way has played a crucial role in our community. No individual or organization can solve our community's problems alone. RUW brings together community stakeholders, contributors, and agency partners to create collaborative and innovative approaches to community issues. Working together, we can provide emergency services, basic needs, and create opportunities in the areas of Education, Income and Health.

HOW YOU CAN HELP

Becoming a part of the change is easier than you might think. RUW is asking everyone to give, advocate, and volunteer because together our resources, voices, and actions can make a real difference right here in the Greater Fredericksburg region.

OUR COMMUNITY IMPACT

GOAL: More households emerge from poverty and achieve greater financial stability

EDUCATION STRATEGIES

1. Children enter school ready to learn and achieve.
2. Individuals obtain a high school diploma or equivalent.
3. Individuals are prepared and ready for the changing workforce.

Rappahannock United Way works to ensure that everyone has access to a quality Education that can lead to a stable job in the future.



INCOME STRATEGIES

1. More households align spending and saving with income.

Rappahannock United Way works to ensure every person in the area has the opportunity to hold a steady job and make enough income to support a family through retirement.



HEALTH STRATEGIES

1. Individuals and families improve healthy behaviors to reduce health risk factors.
2. Individuals reduce negative behaviors that are detrimental to personal and family safety.

Rappahannock United Way works to make our community a healthier and happier place to live.



10 REASONS TO SUPPORT Rappahannock United Way

THE NEED IS GREAT

In our community, 49,000 local residents participate in the Food Stamp program, 9% live below the poverty line, 14% under the age of 65 are uninsured, and 14% of local kindergarten students read below the readiness reading level. 8,790 individuals received vital information from the 2-1-1 Virginia Helpline, and \$1.7 million in tax refunds went to 1,261 low to moderate income workers.

RESOURCES ARE SCARCE

Government funding for health and human services is declining, forcing agencies to scale back or eliminate critical programs even as the needs continue to grow in this tough economy.

YOUR CONTRIBUTION STAYS LOCAL

The money you donate to Rappahannock United Way supports LOCAL programs and agencies. Dollars raised in our community stay in our community to help build a better place for all of us to live and work. This is truly neighbor helping neighbor.

YOUR GIFT WILL DELIVER RESULTS

Rappahannock United Way funded program must be effective, efficient and demonstrate measurable results – to ensure that your contributions make the greatest impact possible. It's not about how many kids are mentored, it's about how many of those kids stay in school to graduate. It's not about how many people get their staples from a food pantry. It's about how many of them no longer need the services because they've become self-sufficient.

YOUR DONATION DOES MORE THAN FUND PROGRAMS

Your donation is improving lives by addressing root causes and creating lasting change.

YOUR DOLLARS LEVERAGE MORE DOLLARS

Because Rappahannock United Way does such a thorough job of reviewing its funded programs for fiscal accountability and program effectiveness, RUW funding is like a "Good Housekeeping Seal of Approval" for health and human service agencies.

NO ONE AGENCY OR PROGRAM CAN DO IT ALONE

It takes coordination and an entire network of programs to keep our communities strong – and that's what Rappahannock United Way provides. With a deep network of relationships with government, community and business leaders, health and human service experts, volunteers and donors, RUW is uniquely positioned to provide the leadership and resources to get things done.

YOUR GIFT WILL ADDRESS THE GREATEST NEEDS

Rappahannock United Way focuses on critical health and human service issues of our day. From elder care to after-school learning to job training to crisis support – RUW works to address the greatest challenges facing people in our community.

65,000

Sixty-five-thousand of your neighbors, coworkers and friends trust Rappahannock United Way with their charitable dollars. For good reason. RUW earned Charity Navigator's highest rating – 4 stars –for the second consecutive year.

WE ALL BENEFIT FROM RAPPAHANNOCK UNITED WAY

From programs that help our neighbors and even our own families cope in the face of unexpected crisis, to programs that help working families overcome life's challenges and remain self-sufficient – we support a wealth of community services that has improved the quality of life in our region. It is up to each of us to protect and sustain it.

EMPLOYEE ENGAGEMENT: PROMOTING RAPPAHANNOCK UNITED WAY YEAR-ROUND

OPPORTUNITIES FOR INVOLVEMENT AND SERVICES AVAILABLE YEAR-ROUND INCLUDE:

- “New Hires” and “Newly Retired” Program – Coordinate with employee orientation process or Human Resource Department
- Rappahannock United Way Website – Stay informed on how contributions are changing lives by visiting Rappahannock United Way’s website. The site includes stories of people whose lives have changed for the better, features and updates on community investments, and answers to questions most often asked. Just click on: www.rappahannockunitedway.org
- Add RUW to your website – If top management at your company gives you the okay, link RUW to your website so that your employees are always in the know about how their investment in Rappahannock United Way is changing the community
- Include RUW in your internal company newsletter – Rappahannock United Way would love the opportunity to send you stories so you can constantly share them with your co-workers through your internal company newsletter. Talk with your Campaign Manager to find out how
- Special Events – Host a special event where all proceeds are donated to Rappahannock United Way; This is a great way to offer fun, engaging opportunities for everyone at your company to be involved

VOLUNTEER! Allow RUW to customize a volunteer experience for your employees before or after campaign season. Volunteerism can boost employee morale and increase retention. GET ENGAGED!
Go to www.RUWVolunteer.org

- Citizen Review Panel Volunteer – Join 100 other volunteers to research and evaluate Rappahannock United Way-funded programs and determine RUW’s investment in each program
- Participate in Days of Caring Events
- Become a Free Tax Prep Volunteer



Campaign How-To: 5 Steps to Building a Successful Campaign

1. BECOME FAMILIAR WITH RAPPAHANNOCK UNITED WAY

Once you have taken on the role of an ECC, your 1st step will be to familiarize yourself with Rappahannock United Way and your organization's workplace campaign. This guide can help you with both

Helpful Hints:

- Attend Employee Campaign Coordinator Training
- Regularly meet with your RUW Campaign Manager, who will help you manage each step of your campaign.
- Your Campaign Manager will help you review your company's past giving, identify strengths and weaknesses, schedule campaign rallies and events, and bring you up to speed on RUW's local impact on our community
- There are many campaign resources available to you such as pledge forms, campaign brochures, posters, the Campaign Coordinator's Corner online, and much more
- Visit: www.rappahannockunitedway.org/campaign for printable resources

2. ACHIEVE MANAGEMENT SUPPORT & INVOLVEMENT

Leaders Lead! By personally endorsing the campaign, members of your senior management demonstrate their commitment to your organization's campaign and Rappahannock United Way

Helpful Hints:

- Schedule time for your RUW Campaign Manager to meet with your CEO
- Ask the President/CEO to hold a RUW educational meeting with his/her leadership team
- Enlist leaders to speak at kickoff meetings, send emails or letters
- Plan events around the CEO's calendar whenever possible or call on other senior leaders to represent the President/CEO
- Work with management to create a plan or campaign leadership succession
- Send a "Campaign Kickoff" letter from your CEO - this will set the tone for your campaign
- Ask top management to give a gift at the leadership level
- Ask management to invest in RUW through a corporate gift

3. RECRUIT YOUR CAMPAIGN TEAM

To build a strong campaign team, include representatives from as many levels and departments of your company as possible

Some roles you may consider for your team:

- Campaign Chair - Your company's top management often designates this individual, who may also function as the ECC
- Campaign Leadership Chair - This person chairs the Leadership campaign and is responsible for soliciting gifts of \$1,000 or more; Generally a management figure, this individual should be a committed leadership donor as well
- Marketing & Communications Chair - To promote the campaign internally and externally and to create fun campaign events & rallies. Also can be called Special Events Chair
- Canvassers - To help ensure everyone is asked to give in every department and business branch. While they do not need to be an active part of the campaign committee, canvassers are a valuable resource for ensuring every person is asked to consider making a gift

4. EDUCATE AND PROMOTE

You understand the mission, you know the vision. Now share your knowledge with your fellow employees.

- **Set the timeline for your campaign, and make it fun.**
 - Company Campaign Kickoff
 - Company Thank You Celebration
 - Have your team attend the Campaign Kickoff (August 27, 2013)
 - LIVE UNITED -Celebration (March 2014)
- **Hold your Leadership Giving Campaign when the CEO can attend. Prospects tend to be employees earning annual salaries of over \$50,000**
- **Schedule employee group meetings for every employee to attend**
- **Hold a Retiree Campaign inviting your retirees to participate and continue giving**
- **Distribute campaign pledge forms and hold a drawing for everyone who returns a pledge card by a specific deadline**
- **Ask current contributors to increase their gift.**
 - Leadership giving, \$1,000 or more annually
 - Potential Step-Up Leadership Givers
 - Offer Incentives
- **Communicate, Communicate, Communicate!**
 - Utilize your company's primary communications channels
 - Communicate reasons to give, company pride and support, events, etc.
 - Success Stories: Utilize RUW's success stories, or even better, identify employees from -your company to share their personal United Way stories
- **Advanced Techniques:**
 - Try a BLITZ- send a series of 5 interesting and educational messages in mailboxes or -email leading up until your campaign kickoff.
 - Find employees to give testimonials at group meetings.
 - Promote, encourage and reinforce the value of volunteerism to the organization and community
 - Tie incentives to different giving levels

5. SUCCESSFULLY WRAP UP THE CAMPAIGN - POST CAMPAIGN (1WEEK)

- **Report the results to Rappahannock United Way**
- **Distribute incentives**
- **Schedule a wrap-up meeting with your United Way staff contact to collect the campaign envelope**
- **Send a letter from your CEO announcing your company's campaign results**
- **Thank every employee for their contributions of time, effort and money**
- **Don't forget new hires**

STEPS FOR ENGAGING YOUR CO-WORKERS

This section will prepare you and your campaign committee to engage your co-workers in the work of United Way and encourage them to contribute to creating a stronger community. Educating your employees about the value of United Way is the most effective way to gain their support. United Way has developed 10 action steps that will help you organize effective engagement strategies.

1. INFORM CO-WORKERS ABOUT RAPPAHANNOCK UNITED WAY.

Inform your co-workers about Rappahannock United Way's journey down the road to impact, community-impact plan goals and strategies. Utilize campaign tools such as the RUW Campaign Corner on the website, toolkit, success stories and more. Many people recognize United Way but are not fully aware of what we do. You are our primary vehicle to spread the message that RUW has transformed to meet the needs in our region. Please utilize the key messages provided in the "10 Reasons to Support United Way" section with your co-workers throughout your campaign activities.

2. SELECT YOUR ENGAGEMENT APPROACH.

Employees can be engaged individually or as a group to discuss their support. Each method has its advantages and many organizations use both. Taking time to engage potential donors is key to obtaining their support.

BENEFITS OF GROUP SOLICITATION

(Approach co-workers with a sense of team)

- Executives and employees are notified in advance of a group meeting at which they will be asked for their contribution
- Allows you to present "Road to Impact" messaging uniformly
- Can be added as an agenda item to existing meetings to accommodate schedules
- Audiences may have the opportunity to hear a Rappahannock United Way story from a United Way staff member or a fellow employee, which has substantial impact on their engagement

BENEFITS OF INDIVIDUAL ENGAGEMENT

(More personal approach)

- Allows you to tailor the United Way message to individual employees
- Gives you the opportunity to speak to a prospective participating employee about their personal giving options

PARTICIPATE IN OTHER UNITED WAY ENGAGEMENT OPPORTUNITIES.

Have you volunteered with United Way as an in-office, free Tax Prep or Citizen Review volunteer? These are all opportunities to engage your colleagues too!

3. PLAN AHEAD FOR YOUR EMPLOYEE ENGAGEMENT SESSION(S).

- Select a date(s), time(s) and location(s) for your session(s) to accommodate the majority of your employees
- Contact your United Way representative to assist in planning and participating in the session(s)
- Send out event information to employees well in advance
- Have audio and/or visual equipment available, if necessary
- Ask senior management to be present/speak (LEADERS LEAD!)
- Secure enough materials for everyone

4. HAVE A STORY TO TELL.

Share your personal experience about United Way or identify someone in your organization to share their experience (i.e. receiving help from United Way or a United Way funded program, participation in a Day of Caring or event, etc.).

5. CREATE AN EXPERIENCE. HAVE FUN!

We've seen companies really roll up their sleeves to have fun while fundraising! Create an experience for your organization – one that depicts RUWs story and the importance of supporting our work.

6. PROVIDE REASONS TO GIVE.

Share United Way's impact and results. No other organization can create leveraged impact like United Way. Conveying the importance of this and the value of supporting RUW is crucial to a successful engagement strategy. Be sure to familiarize yourself with United Way facts and be prepared to answer any questions your co-workers may have.

7. MAKE THE ASK.

After educating your co-workers about RUW and their role in the community, inform them once again of the personal benefits of giving. Be sure to explain the pledging process to your audience.

8. MANAGE FEEDBACK.

You may receive feedback or questions from your colleagues about supporting RUW. Remember to listen to what is being said and establish rapport with the person. Objections are not personal and should be used to begin a conversation. By asking questions, educating and talking through their concerns, it may lessen or eliminate objections all together. Regardless of the employee's response, always thank them for their time. As always, you can refer to or enlist your United Way representative to respond.

9. STAY CONNECTED AND FOLLOW YOUR UNITED WAY DONATION

Rappahannock United Way has many opportunities for you and your fellow employees to stay engaged in our work and the impact of your donation.

10. CONSIDER THE MANY WAYS YOUR ORGANIZATION CAN PARTNER WITH RUW.

- Donate in-kind resources
- Join Rappahannock United Way committees and issue panel councils
- Participate in engagement efforts (i.e. Day of Caring and Days of Action throughout the year)
- Create shared value through a strategic partnership



HOW TO REACH RETIREES: ANOTHER WAY TO GROW YOUR CAMPAIGN

They worked at your company, and maybe gave to United Way for years! But what happens after they walk out of the office for good? More often than not, when someone retires from a company, their United Way contribution retires with them. But, they may continue giving, if they are asked to do so!

FACT: Retirees are long-time, well-established employees who usually contribute more than younger employees. Losing a retiree gift can set back a campaign substantially. But, retiree contributions also count as part of your total campaign!

ASK YOUR RETIREES

There are several ways you can re-engage retirees in your company's campaign, or keep them involved following retirement.

- Does your company have a retirees organization? Get their contact information. Ask to make a United Way presentation at one of their regular meetings. Send members a letter from your company asking them to give
- Include a retiree representative on your campaign team. They probably keep in touch with other retirees and can champion United Way to their peers
- Organize a volunteer activity for retirees. Retired individuals are the fastest-growing volunteer group in the country! Engage your retirees in a volunteer project. Call RUW's Volunteer Center at (540) 373-0041 for help
- Let RUW send a letter to your company's retirees. You just need to provide contact information
- Work with human resources to keep retirees informed. As retirees exit, get home address, phone number and e-mail address, so you can send them information
- Promote payment options. Donations may be paid by cash, check, or major credit cards. Rappahannock United Way can also bill donors monthly or quarterly. Stock and other appreciated assets can also be donated



LEADERSHIP GIVING

A Leadership Giving Program is easy to implement in a company of any size and can be an excellent source of new dollars for your campaign. In fact, it is the most effective way to increase contributions in your workplace. By giving a gift of \$20 a week, leadership givers are making a significant difference in addressing the greatest needs within our community.

APPOINT A CHAIR

Enlist CEO support to appoint a senior executive to serve as the leadership program chair. The chair should be a respected leader willing to invest time, make contact with peers, and be a leadership giver.

DETERMINE YOUR PROSPECTS

Ask your payroll or human resources department for assistance in identifying people who are strong prospects for leadership giving. A common benchmark would be employees earning \$50,000 or more. Another source is to review all employees currently giving \$500 or more to United Way. Send out targeted letters to current and potential leadership donors.

PLAN KICKOFF AND SOLICITATION

This can be a great opportunity to bring upper management and prospects together for a presentation. Pick a format that fits your organization’s culture. The most popular – a CEO-hosted breakfast, lunch or reception. Make it special; make your guests feel important and personalize when possible. Consider having a speaker from Rappahannock United Way. RUW can provide a speaker who can address issues of importance to your organization. Ask your RUW Campaign Manager to assist you with this part of the company campaign. Also, consider touring a community partner agency and see real results!

STEP INTO LEADERSHIP

The Step into Leadership Program is a three-year plan that offers Leadership Circle membership to individuals in the first year who make a commitment to “step-up” to reach full membership status within three years. Participants are recognized as leadership givers the 1st year in our annual Leadership Booklet.

LEADERSHIP RECOGNITION

Personal recognition for those who contribute to RUW is critical.

RECOGNIZE LEADERSHIP GIVERS WITH:

- A personalized thank you letter from your CEO and leadership program chair
- A thank you reception hosted by your CEO and leadership program chair
- Acknowledgment in your organization’s newsletter and other communication materials, as appropriate

RUW WILL RECOGNIZE YOUR ORGANIZATION’S LEADERSHIP GIVERS IN THE FOLLOWING WAYS:

- A personal thank you will be sent
 - Publish a registry of leadership donors and provide each a complimentary copy
- To ensure leadership givers are recognized properly, encourage them to complete the recognition section on the pledge form

LEADERSHIP GIVING LEVELS

COMMUNITY BUILDER
\$1,000 TO \$1,749

COMMUNITY CHAMPION
\$1,750 TO \$2,499

COMMUNITY INVESTOR
\$2,500 TO \$4,999

COMMUNITY FOUNDER
\$5,000-\$9,999

TOCQUEVILLE SOCIETY
\$10,000+



LOYAL CONTRIBUTOR PROGRAM

RUW's Loyal Contributor Program recognizes and thanks donors (of any giving level) who have supported any United Way for at least 10 years. Through their long time support, our Loyal Contributors have positively impacted the lives of hundreds of thousands of people.

WHY INTRODUCE THE LOYAL CONTRIBUTOR PROGRAM TO YOUR CAMPAIGN?

- It celebrates your employees, regardless of their giving level, for their ongoing commitment to the community through United Way
- It makes your employees feel appreciated, reinforcing company loyalty and encouraging community support
- It allows Rappahannock United Way to personally recognize and directly thank long time donors
- It identifies long time supporters for leadership opportunities within the campaign
- It provides your company with opportunities to feature long time supporters in internal communications
- It reinforces your company's appreciation of your employees

HERE ARE SOME SUGGESTIONS TO HELP IMPLEMENT THE LOYAL CONTRIBUTOR PROGRAM INTO YOUR CAMPAIGN:

PRE-CAMPAIGN:

- Build the Loyal Contributor message into campaign kick-off email and materials

CAMPAIGN KICK OFF:

- Recognize your Loyal Contributors at kick-off events and electronic communication
- At the campaign kickoff meeting, ask the Loyal Contributors to stand and be recognized
- Hand out Rappahannock United Way Loyal Contributor stickers
- Host a special Loyal Contributor gathering during the campaign
- Thank your Loyal Contributors by giving them a Live United T-shirt or some other recognition item

POST CAMPAIGN:

- Provide Rappahannock United Way with a list of your Loyal Contributors. You may want to feature their names in your internal communications

YEAR-ROUND:

- Rappahannock United Way will recognize and communicate with your United Way Loyal Contributors through special events and special communication about the impact of their gift

For more information on how to increase leadership giving or loyal contributors in your workplace, please contact your RUW Campaign Manager

THE ART OF ASKING

The #1 reason why people say that they do not give to Rappahannock United Way is because no one ever personally asked them to.

BASIC STRATEGIES FOR ASKING FOR DONATIONS

- Make sure you donate before you ask others to donate
- Educating employees about the value and work of United Way is the best way to gain support; Your United Way representative is an excellent source for any material and assistance you may need
- Promote the results and impact of United Way contributions and LIVE UNITED
- Try to personally distribute campaign materials; Use your committee members to help you. Please do not simply hand out the information with paychecks
- Personalize your pledge forms
- Ask for donations and collect pledge forms at the end of each presentation. Ask every employee to turn in a pledge form by a certain date even if they choose not to give; This way, you'll know every person made a choice whether or not to participate without having to directly ask him/her
- Strive for 100% - all employees, all shifts, all locations
- Follow-up with 72 hours
- Encourage payroll deductions - an easy way to give back to the community

MAKING IT COMFORTABLE FOR EVERYONE

Please take steps during your campaign to ensure that every employee feels comfortable in making a decision about giving. The following are a few reminders to ensure participation is voluntary:

REMEMBER

1. Giving is a personal matter and should be kept confidential. Use incentives, fun and information to get more positive results.
2. Although top management support is invaluable to your campaign, have peers rather than superiors do individual solicitations.
3. Make sure employees know that acts of coercion in any form are unacceptable.



SEGMENTATION

TARGETED COMMUNICATION TO IMPROVE PARTICIPATION

Whether or not your company is large or small, or your campaign “team” is one person or a team of 20 colleagues, targeting your communication can be simple and effective. It doesn’t take a lot more time or a lot of effort. But, it can pay off.

Segmenting your employees into differing groups allows you to appeal to them in different ways. We all like to be talked to in different ways, right? For example, we want a store to know that we are a loyal customer when the store sends me offers. Conversely, we expect a competitive store to talk to us differently than our preferred store. In addition, it usually takes more of an incentive to make us want to switch. That, in its essence, is targeted communication: use specific messages that move people to contribute to your campaign.

Creating a message that is audience-specific can significantly improve results. Several Greater Fredericksburg companies have developed campaign communications that are targeted to distinct groups of their employees. What does this mean?

It means tailoring your message to specific segments of the employee base. Here are some simple ways to identify segments of your employees:

- Previous contributors
- Non-contributors
- First-time contributors last past year
- Previous contributors at the Leadership level
- Potential Leadership givers
- Retirees (if your company has them)

Creating these unique messages – whether via email or in a personal letter – is not complicated but can improve participation levels and overall financial results.

HOW SEGMENTATION WORKS

It will be helpful to analyze the results of your most recent campaign. Look at the number of new contributors? What group do you rely on for the largest share of contributions? What trends can you spot from the most recent campaign? Where are the opportunities to grow?

Many companies and campaigns rely on leadership level giving to elevate their campaigns. Perhaps you could increase this number by reaching out to this audience with a special message – from you, or perhaps the head of your company.

When you decide what groups your campaign consists of, count them up. Whether or not you have access to the contribution information varies by the policies of your company. However you divide up the group, be sure to count the number of employees in each of these groups.

FOR INSTANCE:

- How many new donors did you have?
- If you are trying to raise the overall participation rate, then simply doing custom appeals to NonContributors might be worthwhile.
- Do you have retirees as part of your campaign? An appeal from your company could be the best way to re-engage and keep them connected.

After you establish how many employees are in each group, you can estimate what the increase in donations might be – for each group. This will make it easier to estimate what your overall campaign goal should be. For instance, can you set a goal to increase Leadership level giving by 15%? Or, can you set a goal to get 75% of all new employees to join the United Way campaign?

COMMUNICATION

A message about contributing needs to strike a balance between emotional and practical. We know that people give for different reasons, but the messaging among different segments needs to be subtle, so employees don't feel that a private decision has been revealed to others.

We know that employees share emails and all company communication among each other. An appeal for the United Way is no different. Messaging needs to have a broad appeal, but inspire people with different language based upon the segment they are currently in.

Examples

TARGET SEGMENT:

PREVIOUS CONTRIBUTORS

A: Salutation	You can personalize the salutation: "Dear Nancy,"
B: Introductory Appeal	<ul style="list-style-type: none"> •Share that progress is being made in our community •Mention their previous gifts Use the phrase "elevate" or "move up" to encourage increases <ul style="list-style-type: none"> •Be sure to mention corporate matching or collective giving
C: RUW's Community Impact goals in:	<ul style="list-style-type: none"> •Education •Income •Health
D: Call to Action	Please give now: GIVE, ADVOCATE, VOLUNTEER.
E: Signature	Campaign Chair or CEO/senior manager

TARGET SEGMENT:

NON-CONTRIBUTORS

A: Salutation	You can personalize the salutation: "Dear Nancy,"
B: Introductory Appeal	<ul style="list-style-type: none"> • Emphasize the company commitment to community • Use the phrase "join us" • Encourage gifts of any size • The collective power of many contributions can add up
C: RUW's Community Impact goals in:	<ul style="list-style-type: none"> •Education •Income •Health
D: Call to Action	Please give now: GIVE, ADVOCATE, VOLUNTEER.
E: Signature	Campaign Chair or CEO/senior manager

STRATEGIES FOR SUCCESS

Current Situation:

Employees already give so much...

That's great! It means they understand the importance of supporting the entire community.

Strategy:

- Make sure everyone is educated about United Way and our programs and initiatives
- Don't be afraid to make an ask. Most employees expect it and are ready to give
- Be sure to thank your employees for their entire contribution to our community, whether it is time or financial support. They should feel really good about all they do

Current Situation:

Small or no budget...

With a little creativity, a campaign can be fun and successful without any budget at all!

Strategy:

- Use experiences instead of items as incentives; For instance, ask your CEO to provide dinner at his or her home for the winner of a drawing, or have the senior team wash the cars of drawing winners
- Hold a potluck kickoff, where each person who wants to participate brings in a dish. Departments can put on skits for each other, making the kickoff quite entertaining!

Current Situation:

We have fewer employees than last year...

We know there can be many changes in a workforce and we are there to support you and your employees.

Strategy:

- Share success stories; They can be inspiring and motivating to your employees
- Make it a competition; Look at individual departments and challenge them. You'll be surprised how competitive it can get
- Promote payroll deduction. On average, a contributor who gives through payroll deduction will give four times more than a cash or check

Current Situation:

We have the same number of employees but still have low participation...

This is a common challenge among many types of organizations, large and small.

Strategy:

- Instead of asking just during campaign time, hold fundraisers throughout the year. You can build morale and support the community
- Communicate senior management support. Have CEO's share why they support United Way
- Hold a special Leadership Giving meeting for potential givers. A targeted Leadership Giving campaign can increase your participation and per capita giving rates

Current Situation:

I have no time to dedicate to campaign...

Whew! Chances are, you wear many hats. That's one of the reasons why you're so special to us!

Strategy:

- We've created a special event guide with activities, incentives and themes for you. The activities are broken down by the amount of time and energy needed, cost and purpose (such as fundraiser or team building)
- There are many other materials to help you run a successful campaign. Check out the Campaign Corner on our website.
- Always remember our staff is here to help

Current Situation:

We have multiple locations/shifts...

A multiple locations and/or a non-office environment can sometimes be a challenge. Proper planning can help.

Strategy:

- Create a campaign committee with a person from each location/department. They should also help with planning and solicitation
- Don't leave anyone out. Host a fundraiser that everyone can participate in like a bake sale, used media sale or a jeans day
- Try holding separate events for different locations/ shifts. Make sure they receive all necessary materials

RESPONDING TO CONCERNS AND OBJECTIONS

You may, on occasion, encounter someone who objects to making a United Way contribution. Keep in mind that objections present an opportunity to give more information or clarify misconceptions.

HERE ARE SOME SUGGESTIONS:

Objections are not personal.

- Remember, their objections are not directed at you. We understand that giving is a personal matter and people can feel very strongly about the organizations they support

Objections are often based on incorrect information.

- Try to identify the real issue. Rappahannock United Way is committed to maintaining and modeling the highest ethical standards. We believe in providing leadership and programming that are effective, transparent, compassionate, and inclusive

Show sympathy.

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

Don't argue.

- Instead, offer information about the many ways Rappahannock 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 to expand on it. An insecure, illogical or poorly thought-out objection will fail on its own.

Relax and be yourself.

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

Don't be afraid to say you don't know.

- Let those with questions know you'll get back to them with the answer. Tell them they can visit our website or call us at (540) 373-0041.

Remember, education not coercion.

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

Keep in mind...

- Rappahannock United Way not only funds 47 programs but also initiates and facilitates system-wide initiatives to create long-lasting change
- RUW has always enjoyed a strong partnership with the business community. Approximately 250 businesses in Greater Fredericksburg area host workplace campaigns and understand that we all share a responsibility for the people and neighborhoods where we live, work and raise our families
- Every gift makes a difference and when combined with thousands of other donors, it makes a powerful impact in the community



FUN CAMPAIGN IDEAS

CAMPAIGN THEMES

THE ROAD TO IMPACT

Utilize RUW's 2013 Campaign theme. Incorporate the use of road signs, cars, traffic signals, etc to encourage employees to join us on the road to helping individuals emerge from poverty.

ESPN: EVERYONE SHOULD PARTICIPATE NOW

Use a sports theme to unify your campaign. Kick it off with a tailgate party in the parking lot. Employees can pay to wear their favorite team shirt. Dare to wear a Redskins jersey? You have to pay double.

REALITY TV

Get real with your employees through a reality television theme. Learn to live without necessities and challenge your employees to a "Survivor" obstacle course. Compete in an "Amazing Race" scavenger hunt or hold an "American Idol" karaoke contest. (Glee, Mad Men, Cupcake wars).

RECIPE FOR CARING

Build your campaign theme around food. Have an "Iron Chef" competition and ask a local chef to judge different categories. Host a bake sale or lunch, and create an employee recipe book to sell.

WANTED...UNITED WAY DONORS

Create a Wild Wild West theme complete with your own handmade jail and wanted posters, and lock-up management.

UNITED WAY HIGH

Cafeteria lunch, yearbooks, pop quizzes, grade competitions.

Wii LIVE UNITED

Borrow or rent a Wii. Employees pay to compete in tennis, boxing, bowling, etc. Design elaborate sets (i.e. boxing ring) or keep it simple. Give out small gifts to winners in each round or large gifts to overall champion.

ROCKIN' and RAISIN'

Rock and Roll theme.

CAMPAIGN ACTIVITIES

In-office miniature golf
Tricycle Races
Cubicle Decorating Contest
Office Treasure Hunt
United Way Jeopardy
Funniest Home Videos
Mardi Gras
Legos: Building for our Future
Cruise: Get on Board with United Way
Wall of Fame
Dress-Up the Boss
Get into Shape
Spelling Bee
White Elephant Sale
Stretcher Race
Farmer's Market
Where in the County is Your CEO?
Indy 500 or NASCAR
Christmas in September
Redneck Games
Sausage Race
Battle of the Sexes

INCENTIVES

Time off to go to child's school event
Two hours off per month to volunteer with RUW
Free YMCA Membership or passes to fitness classes
Office cleaned
CEO for the day
Computer lessons from knowledgeable employees
Massage at local spa
Boat Ride
Drawing for plasma TV
Snooze or Cruise (come in late or leave early)
Extra 1/2 hr for lunch
Concert Tickets
Game Tickets
Gift Cards
Executive serves lunch to employees
Use of co-worker's vacation home
Name an Award after an employee
Cookie jar filled with cookie (every week)
Company Picnic

CAMPAIGN PLANNING WORKSHEET

1. **Your plan** for including top management throughout the campaign.

2. **Get help.** List the people you have or will recruit to help with your campaign.

3. **Set goals.** Initial planning meeting date:

Campaign Start Date:

Follow-up meetings:

Campaign End Date:



Total dollars raised
Corporate gift
Employee Pledges
Special Events
Employee Participation %
Employee per capita

	2012	2013
Total dollars raised		
Corporate gift		
Employee Pledges		
Special Events		
Employee Participation %		
Employee per capita		

4. **Identify Leadership Givers** (donors giving \$1,000 +)

5. **Determine** if and how you will have fun with themes and/or special events.

6. **Promote United Way.** List your ideas for communicating the message and keeping people engaged.

7. **Make the ask.** Explain how associates will be given their pledge forms and how they'll be asked to turn them in.

8. **How** will you track and report results?

9. **How** will you thank and recognize donors and committee members?

10. **Ideas** for year-round promotion of the United Way message.

2012

2013

MY CAMPAIGN ACTION PLAN



Our campaign planning will begin on _____ (Note: Include your RUW campaign representative in the planning proces).

Our campaign dates are from _____ to _____.

Our Campaign will focus on (check 2 to 3):

____ Leadership Giving ____ Year-Round Engagement ____ Average Gift

____ Participation ____ RUW Focus Area

The first two things we will do for our campaign are:

Our best practice learned today that we will use in our campaign is:

My Checklist -- Have You:	Date Scheduled/Completed
Met with RUW Rep and ordered supplies?	_____
Met with CEO/Sr. Mgr to get his/her support?	_____
Recruited and trained a campaign team from a few depts?	_____
Set specific goals for participation, avg. gift, and leadership giving?	_____
Scheduled employee meeting and invited RUW to speak?	_____
Obtained incentives that will help you reach your goal?	_____
Developed a campaign theme that encourages contributions?	_____
Discussed how pledges will be processed and reported to RUW?	_____
Planned for your thank you gifts and events, including CEO to personally thank donors?	_____
Discussed your year-round communications plans with your RUW rep?	_____

Our Rappahannock United Way Rep is: _____
Phone: _____ Email: _____

UNDERSTANDING CAMPAIGN MATERIALS: Workplace Pledge Form

Step 1 My Personal Information (Please print clearly.)

Last Year's Gift: _____

Mr./Mrs./Ms. First Name: _____ M.I. _____ Last Name: _____

Home Address: _____

City: _____ State: _____ Zip: _____

E-mail Address: _____ Home Phone: _____

Employer: _____

Employer ID #: _____

☐ I would like to remain anonymous. ☐ I would like to include RUW in my Will or Estate Plan.

☐ I would like to learn about volunteer opportunities. ☐ I would NOT like to receive RUW's e-Newsletter.

Are you a Loyal Contributor? ☐ I have been giving since _____ (Year).
(May include other United Ways. Years need not be consecutive.)

☐ My gift, combined with my partner's, qualifies for membership in the Leadership Giving Circle.

Partner's Name _____

Partner's Employer _____

Recognition Name _____

(This is how you will be listed in the Leadership Giving Circle Brochure.)

Rappahannock
United Way



Privacy Pledge

Rappahannock United Way does not sell, trade, or share your information with others. We will, however, use your contact information to communicate with you the good works that you are helping to achieve in our community. By providing your e-mail address, you are authorizing Rappahannock United Way to contact you via e-mail. You may opt out of these communications at any time.

Leadership Levels

A gift of \$1,000 or more qualifies for membership in our **Leadership Giving Circle (LGC)**:

- ☐ **Community Builder** (\$1,000–\$1,749)
- ☐ **Community Champion** (\$1,750–\$2,499)
- ☐ **Community Investor** (\$2,500–\$4,999)
- ☐ **Community Founder** (\$5,000–\$9,999)
- ☐ **Tocqueville Society** (\$10,000 and Above)
- ☐ **Step into Leadership** (Prepare to join the LGC. Commit to a \$500 pledge now, a \$750 next year, and \$1,000 in the 3rd year.)

Step 2 My Rappahannock United Way Investment (Please select a method of payment from the following)

☐ Easy Payroll Deduction

A. My Pledge per pay period:

- ☐ \$50 ☐ \$25
- ☐ \$15 ☐ \$10
- ☐ \$5 ☐ \$3
- ☐ Other \$ _____

B. To be Deducted:

- ☐ Weekly (52)
- ☐ Biweekly (26)
- ☐ Semimonthly (24)
- ☐ Other _____

C. Total payroll deduction is A x B=

☐ Credit Card (\$50 Minimum. Must provide direct billing address above.)

Total amount \$ _____ ☐ Visa ☐ Mastercard

Card Number _____

Expiration date _____

Security Code _____ (last 3 digits on back of credit card)

Bill My Credit Card: ☐ Monthly ☐ Quarterly ☐ Once on _____

☐ Bill Me At Home (\$50 Minimum)

Home address must be listed in Step 1.

Total amount \$ _____

Please bill me:

- ☐ Monthly ☐ Quarterly
- ☐ Once on _____

☐ Cash/Check Attached

Total amount \$ _____

Check # _____

Make payable to: Rappahannock United Way

☐ Stock/Securities

Total amount \$ _____

To facilitate your stock transaction, please call (540) 373-0041 ext. 311.

Step 3 Sign Here

Signature _____

Date _____

Work phone _____


No tangible benefit was received in exchange for this contribution unless specifically noted. Gifts made to Rappahannock United Way are tax deductible within the limits of the current law. Any cash contribution received by 12/31 will receive a tax letter from Rappahannock United Way. Letters will be mailed by 1/31. If you contribute through payroll deduction, you will not receive a tax receipt. Please retain a copy of this pledge form and your final pay stub to serve as proof of your donation for tax purposes.

THANK
YOU!

Thank you for investing
in our community
through Rappahannock
United Way.

UNDERSTANDING CAMPAIGN MATERIALS: Designation Card

DESIGNATION CARD



To direct your gift, please fill out this information and select one of the options at the bottom. Minimum designation of \$50 per year.

Name: _____ Company: _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: _____

Email:

Signature: _____ Date: _____

☐ I DO NOT WANT my name and home address released to the organization(s) I have designated.

☒ **BEST CHOICE: Rappahannock United Way**

☐ **Rappahannock United Way Member Agencies**

☐ **Alternative Agency***

Giving to Rappahannock United Way is the most effective way to invest in our community. This is your single, best choice for helping the most people in the ways they need it most.

Agency	Annual Amount	Agency	Annual Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

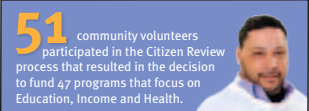
Address

City State Zip

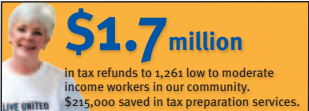
*Agency must be registered with the IRS as a 501(c)3 nonprofit health and human services agency and agency address must be included or gift will be distributed through Rappahannock United Way's Community Impact Fund.

*An administrative fee will be deducted from all contributions designated to alternative agencies.


UNDERSTANDING CAMPAIGN MATERIALS: "GIVE" Brochure




51 community volunteers participated in the Citizen Review process that resulted in the decision to fund 47 programs that focus on Education, Income and Health.




\$1.7 million in tax refunds to 1,261 low to moderate income workers in our community. \$215,000 saved in tax preparation services.




Through our partnership with FamilyWize, **3,921** people in our local community saved \$507,16 on medicine.



8,790 individuals received vital information from 2-1-1 Virginia about local health and human service resources.



\$3.4+ million in community contributions.





65,000+ people served in the Greater Fredericksburg region.


GIVE. ADVOCATE. VOLUNTEER

Encourage your family and neighbors to give where they live.
www.rappahannockunitedway.org
(540) 373-0041

Local Government & CFC Campaign #6400








United Way
Rappahannock United Way


3310 Shannon Park Drive • Fredericksburg, VA 22408
Office: 540.373.0041 • Fax: 540.373.0356
www.rappahannockunitedway.org



Rappahannock United Way was recognized by Charity Navigator as a four-star charity for exceptional management of finances, accountability and responsibility. A four-star rating is the highest rating a charity can receive.



United Way
Rappahannock United Way



WHEN YOU GIVE


YOU CHANGE LIVES.
YOU MAKE AN IMPACT.
YOU LIVE UNITED.

RIGHT HERE IN THE GREATER FREDERICKSBURG COMMUNITY.

WE ENSURE that YOUR GIFT makes the GREATEST IMPACT in OUR COMMUNITY.

"Growing up, I observed my grandparents and parents giving back to the community either with their time or their money so that the community could be more viable. I have adopted the same philosophy. Giving to Rappahannock United Way benefits the entire community."
— Billy and Linda Beale

"I am proud to be a volunteer and contributor to Rappahannock United Way. Its Board, Staff, and many volunteers work tirelessly to make our community a better place to live. Rappahannock United Way truly makes a profound impact and improves lives."
— Ed Allison



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CAMPAIGN REPORT FORM



Rappahannock United Way

DO NOT MAIL THIS ENVELOPE
Please deliver it or call your Rappahannock United Way
Representative for pick-up. (540) 373-0041 ext. 309

Account Info:

Organization Name: _____

Organization Address: _____

Corporate Billing Address: _____

Total Number of Employees: _____ Billing Cycle: ☐ Monthly ☐ Quarterly

Workplace Coordinator Name: _____ Coordinator Phone: _____

Number of Pay Periods in your year: ☐ 12 ☐ 24 ☐ 26 ☐ 52

CEO Name: _____

Employee Donations Enclosed: *(please do not include previously reported information)*

Type of Donation	Number of Donors	Total \$ Amount Pledged	Total \$ Amount Enclosed
A. Payroll Deduction			
B. Cash/Checks <i>Payable to RUW</i>			
C. Other <i>Credit Card, Bill @ Home (\$50. min.)</i>			
D. Special Event Proceeds			
E. Corporate Gift <input type="checkbox"/> <i>Payment Enclosed</i> <input type="checkbox"/> <i>Please Bill</i>			
Report Totals: <i>Add columns from top-to-bottom</i>	Total # of Donors	Total \$ Amount Pledged	Total \$ Amount Enclosed

How To Report Your Results:

- ☐ Collect all Employee Pledge Forms. Complete this Campaign Report.
Also, be sure to SIGN the report. Make a Copy for your records, if needed.
- ☐ Put monies for Special Events in a marked envelope and all other Fully Paid pledges in the Campaign Report envelope.
- ☐ Enclose your company's Corporate Pledge Card, if applicable.
- ☐ Review and correct your company's account information. Then seal the envelope.
- ☐ Deliver or call for pickup: Rappahannock United Way, 3310 Shannon Park Drive, Fredericksburg, VA 22408.

Workplace Coordinator Signature: _____ Date: _____

United Way Representative Signature: _____ Date: _____

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This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

DESTINATION: IMPACT

