



2017
Employee Campaign
Coordinator Guide
Join the Fight



United Way
of Greater New Bedford

Table of Contents

WELCOME	3
WHAT IS AN ECC	4
CAMPAIGN TIMELINE & CHECKLIST	6
BEST PRACTICES	7
SETTING A UW MEETING/CAMPAIGN THEMES	10
CAMPAIGN TOOLBOX	11
MESSAGING/FAQ	13
CLOSING CAMPAIGNS	14
YEAR-ROUND ENGAGEMENT	15

Words from Our Leadership

Dear Employee Coordinator,

We know that United Way campaigns at more than 130 companies throughout Greater New Bedford don't just happen. They are envisioned, led and accomplished by dedicated people like you – our Employee Campaign Coordinators (ECCs). And for that, we offer you our deepest gratitude and admiration.

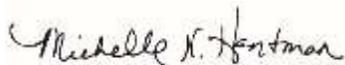
The ECC at each company is truly at the heart of making a United Way campaign successful – and successful campaigns mean that thousands of children, teens, adults and families throughout Greater New Bedford will receive the help they need.

We know that serving as ECC means additional responsibilities for you, and we truly appreciate your willingness to provide that leadership in order to help our community.

We hope the information included in this guide will give you the tools, best practices and guidance you need to make your 2017 United Way Campaign as successful as possible.

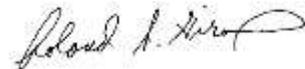
United Way of Greater New Bedford fights for the health, education, and financial stability of every person in the 9 communities we serve. Our campaign theme this year is, “Join the Fight! LIVE UNITED.” It means that each one of us, coming together through the United Way campaign, can strengthen the fight for a healthier, more thriving community for all of us. As an ECC, you help lead the fight through your efforts to make your workplace campaign a success.

Thank you!



Michelle N. Hantman

President & CEO
United Way of GNB



Roland Giroux

UWGNB Board Chair
Acushnet Company



Employee Campaign Coordinator • A person who helps his/her organization work with United Way and leads the organization's annual United Way campaign through planning, implementation and evaluation.

WHAT DOES AN ECC DO?

- Educates co-workers about United Way and provides opportunities for them to get engaged
- Assembles a committee of ambassadors; your colleagues help you build support for the campaign
- Sets goals to increase giving and volunteering (number of donors, dollars raised)
- Holds a campaign kickoff and coordinates other special events
- Distributes United Way materials and pledge forms to colleagues; prepares and submits completed pledge forms to your United Way liaison

BENEFITS OF BEING AN ECC:

- Showcase your leadership and project management skills at work
- Network with colleagues at your organization
- Create positive impact in your community

YOUR TEAM AT UWGNB

Vice President of Resource Development | United Way staff member who assists ECCs with campaign efforts, including year-round activities.

Loaned Executive | Volunteer from a United Way corporate partner who volunteers during campaign season and helps provide the materials for your campaign and schedules workplace presentations.

Gift Processing | United Way team that processes pledges made during campaign.

“I have volunteered as a Loaned Executive for 11 years and also serve as ECC for our workplace campaign. As an LE I have seen firsthand the valuable work of United Way in our community. This experience has allowed me to educate my employees and encourage them to join me in giving.”

**Wendy Mendoza-Rivera
New Bedford Housing Authority**

“Volunteering has always been a passion of mine. However, once I started working with the United Way I really got a sense of what community involvement is truly about. To see the United Way make such a positive impact in the communities that we all live and work in is so powerful. As the community coordinator for my employer, the United Way makes it easy to help my teammates find a local program that makes their support meaningful to them and the communities they live in.”

**Jen Hassey
Bank of America**

EIGHT STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN



Campaign Timeline

PRE-CAMPAIGN

3 TO 5 WEEKS BEFORE CAMPAIGN KICKOFF

- Have a planning meeting with United Way staff or Loaned Executive volunteer to map out campaign strategy.

Analyze past results and set campaign goals: dollar amount and/or number of participants

- Build campaign team
- Plan a Company Kickoff Rally
- Hang Campaign posters, arrange for United Way video to play on company monitors

CAMPAIGN

DURATION: 1 WEEK TO 1 MONTH

Host a kickoff event/meeting with a United Way staff or LE in attendance

- Conduct leadership giving meeting
- Encourage committee members to talk about campaign and giving options
- Send emails about activities (reminders about events, last day of campaign giving, volunteer opportunities, etc.)
- Collect pledge forms and one-time gifts

POST-CAMPAIGN

DURATION: 1 WEEK

- Announce company results
- Thank your campaign committee
- Hang a Thank You Poster
- Debrief with United Way staff

Coordinate year-round engagement activities

- Host a Hunger Commission food drive
- Recruit a team for the Hunger Heroes event on Saturday, November 18th
- Coordinate a Holiday Toy Drive
- Schedule a Company Day of Caring

Celebrate your campaign

Attend United Way's Campaign Celebration in April! If your company reserves a table consider inviting some new campaign donors to attend.

Best Practices

TOP-LEVEL SUPPORT AND CORPORATE MATCH

Endorsement from your company's CEO is vital to the overall success of your United Way fundraising efforts. Sample emails for the CEO to send are available on unitedwayofgnb.org. A corporate match of employee dollars is a great way to incentivize a donor's pledge.

CONDUCT A FUN AND EDUCATIONAL CAMPAIGN

- Don't run your campaign alone — form a committee!
- Use incentives to turn special events donations into payroll deductions/monthly pledges.
- Learn more about United Way before asking: communicate United Way's work in Greater New Bedford and the needs of our community.
- Promote United Way via social media and internal resources.

ENGAGE LEADERSHIP TO STRENGTHEN YOUR COMPANY'S INVESTMENT

- United Way leadership donors are leaders in their organization, leaders in our community and leaders in generosity.
- The success of UWGNB depends on the community working together to create lasting results. Leadership donors lead the fight for positive change. Donors of an annual contribution of a \$1,000 and greater become members in the Navigator's Society. They help build the foundation of campaign success.

GOAL – SETTING

Set a challenging, yet attainable goal. Be ambitious but realistic so your co-workers have an attainable goal to reach. Consider setting a goal to increase overall participation and another for raising a dollar amount. UWGNB can provide historical information for your company- if you don't have access to that prior information.

REVIEW AND WRAP-UP

- **Thank all your donors**
- Provide copies or scans of your pledge forms to your payroll department
- Summarize pledges and one-time gifts on the Campaign Summary Excel form.
- Call United Way to pick up campaign results and/or meet with United Way staff member to review the campaign report envelope
- Inform your leadership team of campaign results
- Plan year-round activities like food drives and volunteer events that match your company's focus area



STRATEGIES FOR A SUCCESSFUL ASK

Please join me in giving
to the United Way of
Greater New Bedford.

How to ask for a pledge

First be sure to make your own pledge or gift first! No one has to know the amount, just that “Yes, I made a pledge.”

GET DONORS’ UNDIVIDED ATTENTION

- Start the discussion on a positive, friendly note
- Explain the purpose
- Find out what they know about United Way

EXPLAIN UNITED WAY AND WHY YOU SUPPORT US

- Bring UWGNB materials and be prepared to explain them. Provide flyers to each person or use a front-of-the-room presentation
- Share a personal story, success story or United Way facts

ASK FOR THE PLEDGE

- With new donors, ask for a first-time gift and offer an incentive for giving
- For annual donors, encourage or incentivize them to increase their gift
- Consider asking for a specific increase, such as \$1 more a week or pay period or a 10% increase
- Remember, you are not asking for yourself; you are asking on behalf of someone who needs help
- Offer incentives for turning in a pledge form or submitting an ePledge

ANSWER QUESTIONS AND HANDLE CONCERNS

- Know your materials and answer questions honestly – never guess
- If you don’t know the answer to a question, let the donor know you will find out and then follow up with United Way staff or a Loaned Executive
- Recognize that some donors have real concerns; people have a right to feel good about their gift

SAY “THANK YOU”

- Regardless of what the donor decides, thank them for their time
- People like to know their gift is appreciated

Setting a UW meeting

SAMPLE AGENDA- 20 Minutes

ITEM	PRESENTER	DURATION
Opening remarks	ECC	2 minutes
Endorsement by Manager	CEO/Manager	3 minutes
United Way Overview	United Way Rep	7 minutes
Campaign Video	United Way Rep	2 minutes
The Ask	ECC	2 minutes
Incentives/Deadlines	ECC	3 minutes
Closing Remarks	ECC	1 minute

MOST IMPORTANTLY – SAY THANK YOU!

CAMPAIGN THEME IDEAS

- Broadway/Hollywood/movies
- Pirates/cowboys
- Sports/local teams
- Hawaiian/beach
- Superheros
- James Bond
- Decades/History
- Carnival/Mardis Gras
- Olympics

INCENTIVE IDEAS

- Gift certificates
- Lunch or dinner with CEO or Manager
- Mugs, t-shirts, key chains, etc.
- Dress down days
- PTO – hour, half day, full day
- Movie or sports tickets
- Prime parking spaces
- Sleep-in-late or leave-work-early days

Campaign Tools

United Way provides a variety of both print and digital materials for you to use in building a campaign that will be most effective for your company.

Here are the items you can choose from:

Print

You may order quantities of any of the materials below and United Way will deliver them to you. We can also provide you with artwork and logos if you want to customize additional materials for your company to print internally.

WHAT YOUR GIFT PROVIDES/WHAT WE MADE POSSIBLE FLYER

Flyer gives specific examples of what an individual gift provides and the improvements that our combined investment in United Way have made possible in our community.

PLEDGE FORMS

Paper versions of our pledge form are available for all campaigns. A copy of the form is also available on United Way's website to email to employees.

Be sure you make a copy of each paper pledge form before you turn the originals in to United Way.

CAMPAIGN ENVELOPE

EMPLOYEE SUMMARY EXCEL SHEET

POSTERS

The 2017 poster is two-sided to reflect the new campaign Join the Fight Give Today. We encourage you to hang these posters to promote the campaign and decide internally which side will be more impactful to your staff. There is space on both sides of the poster to write in company information such as: deadline, who and where to turn in pledge forms, and any incentives. You could use the black and white side to promote the campaign and the full color side to say "Thank You" and put the amount raised.

MASS 2-1-1 CARDS



Business cards that give brief information about the services provided by Mass 2-1-1, our free, 24-hour call center for those seeking community resources. We have these in English, Portuguese and Spanish.

FAMILYWIZE



United Way provides free prescription discount cards to those uninsured or underinsured in Greater New Bedford. Last year, residents using the discount card saved \$98,000. Help us promote this free/no qualification program. Cards available in English and Spanish.

Digital

All print materials can be viewed and downloaded as PDFs at unitedwayofgnb.org

EMAIL TEMPLATE

A sample email to send to employees to encourage participation in this year's campaign.

SAMPLE COPY AND ART for social media use, including a badge/filter that employees can use on their personal social media pages to indicate they have donated to United Way.

USE HASHTAGS # for all of your United Way-related social media posts.

Video

View this year's campaign video online:

United Way website: unitedwayofgnb.org

YouTube: https://youtu.be/sMdlW_u0IW8

Key Messaging/FAQs

ELEVATOR SPEECH

United Way of Greater New Bedford mobilizes people, partnerships, and resources to strengthen the community. We do this by fighting for the Health, Education and Financial Stability of all residents. United Way of Greater New Bedford helps people in the City of New Bedford and the eight surrounding towns: Acushnet, Dartmouth, Fairhaven, Freetown, Mattapoissett, Marion, Rochester and Wareham.

Our work is about connecting children, teens, adults, and families with the tools and support they need to thrive. In short, United Way works with everyone in the community to strengthen the community as a whole.

In addition to the revenue generated by the campaign, United Way secures private grant funding to help support United Way’s **Hunger Commission, Community Building Mini-Grants Program** and **Summer Fund**.

Funding from government contracts totaling more than one million dollars support additional direct service programs for our community. They are **New Bedford Community Connections Coalition, Family Resource & Development Center, and the Safe & Successful Youth Initiative**.

OUR IMPACT AREAS

When you make a donation to the Campaign Community Fund you are supporting programs in three main focus areas:

<p>HEALTH</p> <p>Our Goal: Creating an environment where residents, families, and communities can access the support they need to maintain or improve their health and well-being</p> <ul style="list-style-type: none"> • A Healthy Start • Safe Home & Community • Quality Health Care & Social Services • Supportive Services for Mental Health & Chemical Dependency • Healthy Lifestyles 	<p>EDUCATION</p> <p>Our Goal: Helping children and young adults achieve their full potential</p> <ul style="list-style-type: none"> • Readiness to Succeed in School • Academic Achievement • Empowered and Engaged Families • Life Success 	<p>FINANCIAL STABILITY</p> <p>Our Goal: Connecting individuals to opportunities that help their families break the cycle of poverty and economically prosper</p> <ul style="list-style-type: none"> • Basic Needs • Employment and Job Skills • Maximized Income
---	--	--

WHERE DOES MY MONEY GO?

All funds donated to United Way of Greater New Bedford stay local to help individuals within our own communities.

- This fiscal year, United Way is funding \$289,275 for programs at 20 agencies
- Another \$121,300 was allocated for 6 collaborative programs through South End Engaged

- \$150,000 in funding has been earmarked for the soon to be released Innovation Fund and \$50,000 for the Emerging Needs & Opportunities fund.
- Summer Fund 2017 provided \$77,000 to 16 organizations for summer enrichment programming, such as financial aid for camp, summer jobs for youth ages 16-22 ,and cultural activities
- Community Building Mini-Grants totaling \$34,000, were awarded to 33 all-volunteer groups in July 2017 for a wide variety of programs and projects
- The Hunger Commission works year-round providing free distribution of donated food and locally grown produce and farm fresh eggs to a network of 20 local food pantries and shelters. The Mobile Market directly distributes free produce to low-income working households once a week from July-October. The value of the food delivered by the Hunger Commission was more than \$350,000 last year.

ADMINISTRATIVE COSTS

United Way of Greater New Bedford’s overall administrative costs in fiscal year 2016 were 12.7%. This is well below the Better Business Bureau recommendation that all nonprofit organizations should have no more than 35% on related contributions on fund raising. *More details about United Way’s financials can be found on our website at <https://unitedwayofgnb.org/accountability>*

Closing Out Campaign

Handling Paper Pledge Forms

At the close of the campaign, follow up with your staff to make sure no one has forgotten to submit their pledge form to you.

1. **The following information is required in order for the pledge form to be processed:**
 - » Name
 - » Employer
 - » Total annual gift
2. Be sure to make copies of finished pledge forms and submit to your HR or payroll team for processing
3. Fill in the information on the front of the campaign envelope to the best of your ability
 - » Place pledge forms, along with any cash or checks collected, into the Campaign Envelope provided by United Way. If conducting a rollover or pledge continuation campaign, please ask payroll for a report of current employee donors and amount per pay period or annual amount. If you can submit that report with the excel summary form that is very helpful. You can request that we email you the excel summary form or you may access it on our website.

»**Please note:** In order for United Way to track and process any designated gifts, a pledge form noting the name of the charity must be received each year. A minimum annual contribution of \$104 is required, unless the designation is to another United Way.

» Remember to include documentation supporting any corporate gifts included in your campaign total (corporate pledge form, email/letter confirming your organization's intent to make a corporate gift; please make sure document includes dollar amount)

» Remember to include any special event money raised as well (raffle, bake sale, and dress down days...)

4. Reach out to your United Way contact to pick up the envelope
5. Thank your co-workers!

Tips for Year-Round Engagement

United Way's three core actions are: Give. Advocate. Volunteer. Upon completing the end-of-year giving campaign, the rest of the year your relationship to United Way should focus on advocacy and volunteering.

ADVOCATE

SOCIAL MEDIA

- Stay up to date on United Way's work by following us on Facebook, Twitter, and Instagram
- Participate in social media campaigns around United Way's community focus on Health, Education, and Financial Stability

VOLUNTEER

UNITED WAY IS YOUR HOME FOR CONNECTIONS TO VOLUNTEER OPPORTUNITIES ALL ACROSS THE COMMUNITY

Check out www.volunteersouthcoast.org, United Way of Greater New Bedford's website where you can find opportunities that fit your schedule, interest, and location!

UNITED WAY VOLUNTEER EXPERIENCES

Year-round United Way engagement opportunities include: Days of Caring, Youth Day of Caring, Hunger Heroes, Mobile Market, the Community Outreach Team, and the Clambake with Lobster fundraiser.

SKILLED VOLUNTEERING

United Way of Greater New Bedford is a Certified Service Enterprise organization and serves as the local hub to convene organizations to participate in the training and certification process. United Way of Greater New Bedford's Victoria Grasela, Marketing & Community Relations Officer also serves as a coach. Please contact Victoria at vgrasela@unitedwayofgnb.org or more information.