

2013 CAMPAIGN GUIDE



LIVE UNITED

**United
Way**



**United Way
of Greater Lafayette**

uwlafayette.org

1114 East State Street Lafayette, Indiana
www.facebook.com/uwlafayette

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WELCOME

Welcome to United Way of Greater Lafayette and thank you for your continued support! Together, we are embarking on a journey that will make an indelible mark on our community, your company and yourself. Your role as a campaign volunteer is crucial. You are our messenger for change, the eyes, the ears and the voice of the community.

You are the champion for the future of this community. Without you, we simply could not reach the individuals you work with - working in businesses and organizations across the city - and unite those who want to create lasting change.

At the same time, we know that as a campaign volunteer, taking on the responsibility of your company's fundraising campaign is a lot of work in addition to the job you do each day. We are here to support you with everything you may need to help make your company's campaign a success. This guide will answer your questions, give step-by-step instructions, provide timelines, and offer creative campaign ideas to help you plan, implement and achieve success - all without having to clone yourself or hire an assistant.

We can't thank you enough for your time and commitment as it is your efforts in the workplace that will directly impact our ability to affect positive change in the community.

WHAT IS UNITED WAY?

United Way is a local organization run by volunteers and assisted by a small staff. United Way does much more than raise money. United Way improves our community by focusing on Education, Income and Health. We bring people, organizations and resources together to deliver results. You can give, advocate and volunteer. Join us and Live United.

Our Mission

Mobilizing our community to improve lives.

Our Vision

United Way will add value to the Greater Lafayette community by enabling people to help one another. It will provide leadership in defining community needs and in coordinating resources to address community issues.



YOUR DOLLARS AT WORK

United Way of Greater Lafayette provides people the opportunity to make a meaningful difference in the lives of everyone in our community.

United Way donors have three ways to invest their gift:

1. Community Care provides the highest return on your investment. By pooling individual gifts with contributions from thousands of local donors, tremendous strides are made toward building a better community. By selecting Community Care, you allow your gift to be distributed through the community investment process. Contributions go where the needs are the greatest, so you can influence the condition of all.
2. Focused Care allows you to direct your gift to a specific focus area: Education, Income or Health. You may target your gift to any of the Focus Areas or give to all three focus areas with one gift to Community Care.
3. Restricted Contributions enable a donor to limit their gift to a specific agency. Gifts restricted to organizations outside the United Way family are subject to an eight percent administrative fee.

GETTING STARTED WITH YOUR CAMPAIGN

As a campaign coordinator, you are one of many United Way volunteers across the community who will plan, organize and implement a campaign. At this point, you might be asking yourself, "So, now what do I do?"

We're here to help you plan an enjoyable, meaningful and successful campaign. Call our development associates at any point in the campaign process for support. They are happy to help you!

Your primary objective is to empower your co-workers to participate in creating a stronger community. By Living United:

Your organization or company will

- be recognized as a leader in positively impacting people's lives.
- be regarded as a caring community employer.
- build relationships with other key community leaders.

You and your co-workers will

- increase knowledge of community needs and United Way's impact.
- build employee morale and company pride.
- provide leadership and development opportunities for campaign committee volunteers.

You help build

- a stronger, healthier community.
- improved quality of life for everyone.
- a vital economy.

TIPS FOR COORDINATING A SUCCESSFUL CAMPAIGN

Know Your Company

Support from top management will benefit your United Way campaign greatly. That's why it is important to meet with your CEO and ask them to assist with your campaign. They can provide leadership within your organization and increase support of your efforts as an Employee Campaign Coordinator.

- Ask for matching donations of employee giving for the corporate gift.
- Ask for past year's giving history, previous goal, number of leadership donors and percent of participation.

United Way staff can help you with this information if you do not have the records internally.

Know Your United Way

Get to know who we are and what we do. This guide is an excellent resource. You can also

- visit our web site at uwlafayette.org
- Like us on Facebook (facebook.com/uwlafayette)
- Follow us on Twitter (twitter.com/uwlafayette)
- or plan time with one of our development associates to get to know us better.

Other tools you can use include our current video or brochure. What else do you want to know? Just ask! We love to hear from you.

Utilize United Way Staff and Resources

We are here to help you build the best campaign strategy for your company or organization. Staff can connect you to materials like our video that provides an overview of how United Way is advancing education, income and health in our community. We can also schedule a Loaned Campaign Representative (LCR) to speak at your employee meetings. Let us know what you need to do your job better.

Develop Your Campaign Plan

We recommend recruiting a campaign committee to help spread enthusiasm and information about United Way. Can you recruit representatives from different departments? Shifts? Locations in our community? Consider recruiting committee members from marketing, human resources, payroll, senior management, department leadership, other company locations, past United Way leaders, and Union representatives if applicable. Establishing a diverse committee of United Way supporters makes campaigning easier and generates diverse ideas and more creativity.

Promote Your Campaign

Build excitement about your campaign even before your first employee meeting. Let everyone know that together, you are working toward a common goal. Use your company newsletter or intranet to get the word out. Present each employee at your organization with the opportunity to make a contribution. Introduce employees to their committee. Special events can enhance employee giving by incorporating fun and awareness into one event. ***It is best to have your special events at the end of campaign so they do not replace or compete with annual gifts.***

Promote Leadership Giving

The Leadership Giving program at United Way of Greater Lafayette is called The Vanguard. Members of The Vanguard make an annual gift of \$1,000 or more. This group demonstrates an exceptional commitment to helping others. United Way honors this group of donors by including them in the Vanguard Leadership Directory and inviting them to a reception each year. Last year, 940 donors pledged more than \$1.6 million to United Way via The Vanguard.

Establishing a company-wide leadership giving program. In order to promote leadership giving in your campaign, you may want to host a leadership meeting. This can be an informal or elaborate meeting. Have special incentives to encourage employees to turn in pledge cards at the end of the meeting. This will save time and allow you to report immediately how committed your leadership team is to the community. The Vanguard Step-Up program may be appealing to potential leadership donors too.

Another important fact to note is that employees may combine their gift with their spouse's gift to qualify as members of The Vanguard. Because the individual employee gift may not be at the \$1,000 level, we ask that they indicate their combined gift on their pledge card with their spouse's name and place of employment.

Report Results and Submit the Campaign Envelope

Once you have collected your organizations pledge cards, you should submit them to your United Way. It is important to us that your campaign runs smoothly. In order to do so, please make sure that when you submit your reports that all necessary information is included. Items that should be included in the report envelope are individual pledge cards (make copies for your payroll department if necessary), the corporate pledge card, and any special event fundraising monies. Don't forget to return borrowed supplies like banners or dvds at the end of your campaign too!

Say "Thank You"

Thanking people will leave them with a positive feeling after campaign concludes. Be sure to thank your CEO for his or her involvement. Thank employees for coming to meetings. Thank donors for giving. Thank committee members for their support. Thank You. Those two simple words show appreciation and set the tone for year-round communication and next year's campaign. There are so many ways to thank donors and employees.

- Make use of bulletin board and lunch rooms.
- Post photos of employees participating in campaign events on bulletin boards, the company web site or via email.
- Ask your CEO to host an appreciation breakfast or lunch for the campaign committee.
- Include a special thank you message in payroll stuffers.
- Put a thank you note in the company newsletter.
- Create certificates of appreciation for committee members.
- Consider sponsoring a company thank you breakfast, luncheon or reception for campaign donors and committee members.

Critique Your Campaign

What went well? What do you wish you would have known? What could have been better? What do you wish to do next year? Document your thoughts once your campaign concludes to ensure future successes.

Promote United Way Year-Round

Campaigning for pledges will be much easier when your employees are exposed to United Way year-round. This is also a good way to keep employees involved in our community. Include United Way information as part of new employee orientations. Share United Way's e-newsletter and Quarterly Connection with colleagues. You may also consider adopting a few volunteer projects each year to continue the focus on community.

TIPS FOR MAKING THE ASK

The number one reason that people do not give to United Way is that they are not asked to give. Not everyone will be able to attend the campaign kick-off, so it's important to follow up with employees. Although it can be difficult to ask your co-workers for money-especially to increase their support-remember that people feel good about helping others. As your colleagues better understand the work of United Way and how their contribution impacts the community, they become more generous.

Know the Facts

Read your United Way materials carefully. The more you know about United Way, the easier your job will be. Prepare a solicitation case. Don't forget to use other resources like Facebook, Twitter and United Way staff to help you with this.

Make Personal Contact

People give to people so set up face-to-face meetings to ask for support rather than leaving pledge cards on desks, in paychecks or the break room. Group meetings are the most effective and efficient way to reach all employees in an organization. It can take as little as 20 minutes to convey the key message to your group, make the ask, and even show the United Way video.

Be Positive

Explain the benefits of giving to United Way. Stress the importance of each individual's contribution to our community. Emphasize that you're raising funds for programs that help children succeed in school, individuals get stable jobs and housing, strengthen families and neighborhoods and put people on the road to becoming socially, emotionally and economically self-sufficient.

Be Prepared for Questions and Concerns

People deserve to know their money is being used wisely. If you don't know the answer to a question, find out by calling United Way. We'll help you get the right information for your colleagues.

Schedule a Loaned Campaign Representative

Loaned Campaign Representatives are available to speak to your employees about United Way and how we are advancing education, income and health in Greater Lafayette and Tippecanoe County. Their presentations can be as short as 5 minutes or as long as 20 minutes. They are available seven days a week, any hour of the day. Visit our web site or call us to schedule a presentation for your company. If you're not comfortable asking your co-workers to give, consider scheduling an LCR presentation because these volunteers are trained to educate our community and ask for support.

Remember Contributions are Voluntary

Giving is a personal matter and a personal decision. Whether individuals wish to give and how much they choose to give is up to them. We believe every campaign volunteer has the responsibility to tell those they solicit the reason they are being asked to give-to ensure that services are available to those who need them-and to ask for a meaningful contribution in support of those services. Well informed employees are the best contributors. Remember the following when campaigning:

- Giving is a personal matter that should be kept confidential.
- Employee giving should never influence personnel decisions.
- A campaign objective based solely on 100 percent participation can create a perception of pressure, real or implied.
- Be sure to communicate that 100 percent pledge card return is encouraged even if a contribution is not made.
- The most effective solicitations are peer-to-peer. That is, managers should solicit other managers; workers should solicit fellow workers.
- Be sure employees know acts of coercion in any form are unacceptable.

FREQUENTLY ASKED QUESTIONS

Where can I find a list of United Way agencies?

A list of funded agencies and United Way programs is included in the United Way brochure. You can also find this information on United Way's web site.

What is the difference between United Way of Greater Lafayette and United Way Worldwide?

Our local United Way is just that - local. We are an independent organization run by a volunteer board of directors made up of volunteers from our community. United Way of Greater Lafayette operates solely to benefit our local community. United Way is our community's largest volunteer organization with more than 130 local residents on its Board of Directors and various committees. Our staff coordinates and implements directives of the Board. United Way Worldwide is a global leadership and trade association to which local United Ways across the country belong. United Way Worldwide owns the name "United Way" and the associated brand marks and manages a number of critical relationships with national and global corporations with locations in Greater Lafayette and beyond. Membership within United Way Worldwide does not interfere with local decisions on investing campaign dollars in services or working to improve our local community.

How is the money raised in our community distributed?

Community volunteers make up our Community Investment Committee which seeks to invest campaign dollars into our participating organizations according to their ability to get results. In addition to reviewing financial documents, our volunteers look at how each agency improved lives of the people it serves, how it knows that it is improving lives, and how the agency fits within United Way's priorities. We also review agency plans for using funds to get the results they promise. Volunteers evaluate agencies annually and seek to help them improve their programs and services where possible.

How much of my contribution actually goes to fund services in our community?

United Way of Greater Lafayette's audited overhead rate is 8.5 percent, ranking it as one of the most efficient United Ways in the nation. Vanguard gifts more than cover the cost of doing business. In fact, leadership donors give so generously that more than \$1 million in Vanguard gifts along with all other campaign gifts are invested directly in services that benefit our community.

How does a non-profit become a participating organization?

An organization that wishes to become a member of the United Way family must:

- be a 501(c)3 organization certified by the IRS
- have an active volunteer board of directors
- serve individuals in Tippecanoe County
- have a strategic plan and run efficient operations

An organization should also be able to partially support itself through fees or fundraising because United Way does not provide any organization with 100 percent of its operating budget.

I work in Tippecanoe County, but I do not live here. Can I designate my gift to my home county?

By contributing here, where you work, you help support this community's network of human services. However, if you choose to designate to another United Way, you may do so, but your pledge will be assessed an eight percent administrative fee.

Is my gift tax deductible?

Form 1040, schedule A is used to itemize deductions and reduce the taxable portion of your income. Even if you give non-cash assets, the donation will save money when filing your tax return. Be sure to keep the receipt from your pledge card and a paystub to show proof of payment for your pledge in the event you are audited.



APPENDIX

UNITED WAY STAFF DIRECTORY

James Taylor	CEO	765.742.9077 ext. 223
Paige Ebner	Development Associate	765.742.9077 ext. 234
Stephanie Patacsil	Development Associate	765.742.9077 ext. 230
Erin Hallett	Communications Associate	765.742.9077 ext. 241
Earl Cox	AFL-CIO Community Services Liaison	765.742.9077 ext. 231
Emily Bollock	Education Assistant	765.742.9077 ext. 244
Laura Carson	Finance & Community Impact Director	765.742.9077 ext. 233
Mokina Castro	Health Associate	765.742.9077 ext. 237
Jane Dieterle	Accounting Associate	765.742.9077 ext. 229
Jillian Henry	INRN Western Region Director	765.742.9077 ext. 228
Angela Maynard	Impact Assistant	765.742.9077
Jennifer Merzdorf	Administrative Assistant	765.742.9077 ext. 221
Jennifer Million	Income Associate	765.742.9077 ext. 227
Amy O'Shea	Education Associate	765.742.9077 ext. 244
Amy Wood	Volunteer Associate	765.742.9077 ext. 222



PLEDGE FORM

Please be sure to print clearly so we can stay in touch and say "thank you" more easily.

United Way of Greater Lafayette
uwlafayette.org



1114 East State Street #200 Lafayette, IN 47905
Phone: (765) 742-9077

Company Name: _____
Please make copies as needed for your payroll department.

MY INFORMATION 1

Prefix _____ First _____ Middle Initial _____ Last Name _____ Suffix _____
Home Address _____ City _____ State _____ Zip _____ Home Phone _____
Work Phone _____ Cell Phone _____ Preferred Email _____

GIFT & PAYMENT INFORMATION 2

- Select your gift option**
- EASY PAYROLL DEDUCTION**
Contribute this amount each pay period: \$ _____
Pay periods per year: X _____
My total annual gift: \$ _____
- ONE TIME GIFT** Total \$ _____
- Cash or Check** (enclosed) Check# _____
- Credit Card** (Visa, MasterCard or Discover only)
Card number: _____
Expiration Date: _____
- BILL ME** (\$50 minimum gift required)
- Once in _____ (month/year)
 Quarterly Monthly

LEADERSHIP GIFTS 3

Please consider giving at the Vanguard level of \$1,000 or more. If your spouse/partner gives separately, you may combine your gifts for recognition at this level. Your generosity will be recognized in the Vanguard Directory.

Please recognize my gift in the Vanguard Directory. Print your name below to indicate how you wish to be listed.

I would like my spouse's name and gift recognized with mine.

Name: _____

Gift: _____

Workplace: _____

Total combined gift: \$ _____

Please do not publish my/our name in recognition materials. We would like to remain anonymous.

I have pledged \$500 or more and would like to participate in the **VANGUARD STEP UP PROGRAM**. Please recognize me as a Vanguard.

MY AUTHORIZATION (signature required) 4

Signature: _____
Date: _____

Please sign regardless of payment preference

OPTIONAL 5

I wish to make a gift to United Way of Greater Lafayette.

- COMMUNITY CARE** The most powerful way to invest your contribution. Your gift supports *all* United Way funded activities.
 FOCUSED CARE Give to an issue important to you. Please select one focus area for your gift. Education Income Health

I wish to restrict my gift to a specific agency.

- RESTRICTED CONTRIBUTION** Restrict my gift of \$50 or more to the following agency. Please print the agency name and address below.

I would like United Way to *request* that the agency acknowledge my restricted gift.

NOTE: The agency you restrict your gift to must meet IRS requirements for charitable gifts. Noncompliant gifts will be directed to United Way of Greater Lafayette. Gifts restricted to agencies outside of United Way of Greater Lafayette participating organizations will be subject to an 8 percent administrative fee.

PLEASE TEAR OFF THIS SECTION AND KEEP FOR YOUR ANNUAL TAX RECORDS.

No goods or services were given in exchange for this contribution.

Thank you for Living United.



1114 East State Street #200 Lafayette, IN 47905

Be sure to keep your donor receipt for tax purposes!

DONOR RECEIPT

Name: _____

Date: _____

Total Pledge Amount: \$ _____

REPORT ENVELOPE

Reporting results is simple! Please be sure to complete this form. Just follow these steps:

- 1. Please print and sign your name in the coordinator information area.**
- 2. Don't forget to provide the payroll information. Your payroll department or processor can help.**
- 3. Gather completed pledge forms. Make copies for payroll. Divide your forms into stacks for cash/check, credit, and payroll deduction to total in the summary area.**

Name _____ Envelope # _____ Node _____
 Account # _____ Division _____ Campaign Year _____

IN-HOUSE CAMPAIGN COORDINATOR

Please report **ONLY** the amount in this envelope and include copies of ALL pledge forms.

This report prepared by _____ Phone _____ Date _____
 (Please print and sign your name)

Number of Employees _____ We will have more contributions to report Our Campaign is completed

Payroll Deductions Information

Please send payroll deduction statements to the attention of:

Address: _____ City/State/Zip: _____

Mail Statements: Monthly Quarterly Do Not Bill

Employee payroll deductions begin in _____ (month) and end in _____ (month).
 We have _____ (number) of pay periods per year.

ENVELOPE SUMMARY

	# of contributors	Total Amount	Payment Enclosed	Balance Due
<u>Corporate Gift</u>				
<u>Employee Gifts & Fundraisers</u>				
Cash & Checks (Please convert to check, if possible)				
Credit Cards				
Payroll Deductions (Retain copy of pledge cards for your records)				
Billed by United Way (Must have home address)				
Fund Raising Events (full amount must be enclosed)				
TOTAL Employee Gifts & Fundraisers				
TOTAL Corporate & Employee Gifts				

UNITED WAY USE ONLY			
Finance			
_____ Journal Entry			
<input type="checkbox"/> Designations			
<input type="checkbox"/> Out of County			
Audit			
Name			
Date			
<input type="checkbox"/> Vanguard			
<input type="checkbox"/> Designations			
<input type="checkbox"/> Acknowledgments			
Out of County \$			
Corporate	Total	Enclosed	Due
Employee			
TOTAL			



United Way of Greater Lafayette
 1114 East State Street #200
 Lafayette, IN 47905

Phone: (765) 742-9077 Fax: (765) 742-9079

SAMPLE COMMUNICATIONS

Campaign Endorsement Letter from CEO

Dear Employee,

If you're like me, you look for the best buy for your dollar when you're in the market for a particular item. That's why I support United Way. For my money, there's no "better buy" than United Way when it comes to meeting needs in our community.

But that's not the only reason I consider United Way a terrific bargain. When I give to the United Way, I become a part of the only local association of donors that can pull together the large number of resources needed to truly impact the serious problems facing our community. United Way volunteers and staff study our area's needs and the programs best able to address them. As a result, the programs United Way helps fund work together to address our community's most pressing issues.

I encourage you to join me in giving generously to this year's United Way campaign. Together, we can help United Way build a stronger community for us all.

Sincerely,

Name

Dear Employee,

I am pleased to announce that on (date), (company) will kick off its United Way campaign. As that date approaches, I want to let you know why I support United Way, and why I encourage you to consider supporting it too.

When you donate to United Way, it's like casting a stone into a pool. You can see the ripples of your contribution spread throughout the community helping children, families and individuals build better lives for themselves.

Your donation will support programs that nurture the next generation, meet emergency needs, and build a healthier community.

Please give generously to this year's United Way campaign.

Sincerely,

Name

Endorsement Letter from Labor

Dear Brothers and Sisters:

As you know, the labor movement is dedicated to the welfare of its members. However, we all recognize that the wellbeing of our members depends on the health of our community as a whole.

That is why in addition to those initiatives that benefit our members, organized labor has consistently supported efforts that strengthen our entire community. Organized labor has long supported United Way, which is why I encourage you to give to this year's United Way campaign.

Your gift to United Way will help more people in more ways than any other way of giving. Your donation will support programs that nurture the next generation, meet emergency needs, and build a healthier community.

With your support, United Way can continue to build a stronger community for all of us. Please give generously to this year's campaign.

Sincerely,

Name

CEO Thank you to Volunteers

Please accept my thanks for the role you played in making this year's United Way campaign a success.

Because you were willing to give of yourself, our company raised \$_____. These funds will help local agencies to build a stronger, more vibrant community by meeting emergency needs and nurturing the next generation. Research shows that for every dollar spent in prevention, a minimum of \$7 is saved on intervention.

I am proud of you, and you should be proud of yourself. The gift of your time and your resources will result in a stronger community for all of us.

Sincerely,

Name

CEO Thank You Letter to Donor

Thanks to your generosity, we have concluded the most successful United Way campaign in our history!

We raised \$____, which exceeded our goal by ____ percent. These funds will help local agencies to build a stronger, more vibrant community by meeting emergency needs and nurturing the next generation.

I want to express my sincere appreciation for your participation in this year's campaign. Your willingness to help others will make it possible for United Way and its participating organizations to lead the community in creating new solutions to local challenges.

Sincerely,

Name