

important dates to remember

campaign cabinet

We request that all Campaign Cabinet members attend meetings on the following dates:

monthly morning meetings

United Way, 320 E Gutierrez St, SB

- Wednesday, May 20 from 8:00-9:30 AM
- Wednesday, June 10 from 8:00-9:00 AM
- Wednesday, July 8 from 8:00-9:00 AM
- Wednesday, July 29 from 8:00-9:00 AM



320 E. Gutierrez Street
Santa Barbara, CA 93101
phone: (805) 965-8591
fax: (805) 962-3461
www.unitedwaysb.org
www.volunteersb.org
www.partnershipsb.org

calendar of UW events

executive club luncheon

Thursday, June 11, 2009
11:30 AM - 1:00 PM
Four Seasons Biltmore

pacesetter campaign kickoff

Wednesday, July 1, 2009
11:30 AM - 1:30 PM
Fess Parker's DoubleTree Resort

day of caring

Saturday, September 19, 2009
8:00 AM - 1:00 PM
Page Youth Center and Agency Sites

red feather ball

Saturday, October 10, 2009
6:00 PM - midnight
Fess Parker's DoubleTree Resort

holiday bash

Wednesday, December 9, 2009
5:30 - 7:30 PM
Fess Parker's DoubleTree Resort

volunteer opportunities

lunch bunch

Volunteer a lunch hour between June 22nd-August 7th for kids who need you. Come alone or with co-workers and be a role model for low-income and at-risk children right here in our community.



Contact Jenny Lewallen at 965.8591 x138.

day of caring

Join over 1,000 people at the largest single-day volunteer event in Tri-County! Help local agencies accomplish much-needed projects that they can't complete on their own time. Lend a hand and build a community! September 19, 2009



Contact Juli Askew at 965.8591 x110.

customized options

Give us a call at 965.8591 and we will connect you with a personalized way to help. We want to help you give back however you can. Thanks!



320 E. Gutierrez Street
Santa Barbara, CA 93101
phone: (805) 965-8591
fax: (805) 962-3461
www.unitedwaysb.org
www.volunteersb.org
www.partnershipsb.org

Campaign Cabinet Booklet 2009-2010



your guide to success as a top-level volunteer



Welcome to Campaign Cabinet!



John Wigle,
Community Campaign
Chair



Janet Garufis,
Deputy Campaign
Chair

thank you for your help!

You are part of our top-level volunteer group, United Way of Santa Barbara County's Campaign Cabinet. As part of this elite team, you will open doors and streamline efforts to raise money for children, families, and seniors in need. With your help, we can connect workplaces and individuals and increase our impact on the community.

We hope that you will find Campaign Cabinet challenging and rewarding. United Way of Santa Barbara County's trained staff are available to assist you at every step and ensure that Campaign Cabinet is the best use of your donated time.



George Leis,
Finance Division Chair at Tea Fire
Response Fund Press Event

John Wigle, Campaign Chair
with Lynda Nahra, last year's
Campaign Chair



Cynder Sinclair, Non Profit Division
Co-Chair at Red Feather Ball

steps to success

1. **set a personal appointment**
 - Secure a 15-30 minute visit with the decision maker to discuss United Way involvement.
 - Once you have set a face-to-face meeting, call or email United way staff to notify them.
2. **give a good first impression**
 - Plan to arrive 10 minutes early to discuss talking points with United Way staff.
 - Establish rapport with the decision maker during the first 3 minutes (first impressions count!)
3. **communicate the value of united way**
 - Tailor your information to the decision maker's/company's needs and goals.
 - Explain why you support United Way personally/as a company (see pages 1,2 & 7 for some ideas).
4. **request an employee involvement campaign**
 - Work with United Way staff to confirm: campaign, presentation, payroll deduction, etc.
 - Overcome any objections with United Way staff and understand the contact's motivations.
5. **ask for a personal commitment**
 - Ask the decision maker to join Executive Club and explain the benefits of membership.
6. **ask for organizational support**
 - If the decision maker agrees to an employee campaign, ask for a 50% corporate match.
 - Ask for a certain level of corporate gift or event sponsorship.
7. **encourage employee volunteerism**
 - Ask the decision maker to volunteer personally and encourage employees to volunteer as a team at Lunch Bunch (one hour June 3-Aug. 28) and/or Day of Caring (Sept. 20), or as individuals in many tailored opportunities. Encourage your younger employees to join Young Leaders Society (ages 21 to 40).
8. **thank the decision maker**
 - Let the decision maker know that you appreciate their time and their efforts.
 - Coordinate with United Way staff who will send a thank-you note or make a follow-up call.

And lest we forget to thank our wonderful Campaign Cabinet volunteers...

Thank you for your commitment to our community!

campaign calls

Try to remember our overall goals (page 6) when calling. Your initial objective is to set a meeting with a decision-maker, yourself, and United Way staff to discuss a campaign, corporate gift, or personal pledge.

introduction

- Say hello and develop rapport: how is business going? Are they going on any vacations soon? etc.
- You are calling on behalf of United Way of Santa Barbara County's Campaign Cabinet
- You recognize they are a community leader and would like to see how United Way can work for them
- Use a leading question to frame the discussion: "How does [Company] care for the community?"
- Answer any initial questions that they may have about United Way of Santa Barbara County

objections

Most decision-makers will offer any objections at this point. After you have overcome initial objections, you can discuss benefits and set an initial meeting.

- **Objection #1 Talk to my assistant, HR Director, etc.:** We would like to meet with someone who can make a final decision so we don't have to take your company's time twice discussing the same thing. You sound like you are in the best position to decide how United Way can work with you.
- **Objection #2 I am too busy to meet:** Since you're so busy, I'll keep the meeting short. United Way has some of the easiest ways to give back to the community. Even if you're not thinking about giving back, this is great free PR for you. Why don't I save you time and grab coffee/lunch for you?
- **Objection #3 I don't want to pressure employees:** Neither do we! Your United Way campaign will be low-pressure and allow employees to impact every area of the community. We want employees to pledge because they care--without a campaign, they won't even have the option.
- **Objection #4 We are supporting other charities:** We're glad you support the community! We partner with over 80 agencies to impact local people in need. Studies have shown that most people need 4-5 services to overcome a negative cycle. By working with us, you help people in the most effective way.
- **Objection #5 Bad campaign impression:** We are sorry to hear that. What happened?...I want to talk with you about how positive a United Way campaign can be. You can make the difference between a negative experience and a team-building opportunity. Let's talk about how we can make it work.

benefits

- United Way staff have a number of other benefits we can discuss with you, including these:
- **Team Building:** Nothing brings employees together like helping others. A United Way campaign is the simplest team-building activity you can organize.
- **Effectiveness:** Many charities help the community in one way or another, but United Way of Santa Barbara County brings about results that no other organization can--through our partnerships.
- **Recognition:** You will be positioned as a community leader. 84% of Americans say they will switch brands, when price and quality are equal, to support a cause.

close

- Once you have overcome objections and explained benefits, set a time and date for a face-to-face meeting. Contact United Way staff and we will discuss our goals for the meeting.

Table of Contents

united way of santa barbara county:

our community focus 1

frequently asked questions 2

campaign cabinet:

organizational chart 3

divisions 4

role and responsibilities 5

goals 6

sample call 7

steps to success 8

calendar on back cover

vision, mission, and core values

vision

In our community, everyone has a hopeful future.

mission

Right here, right now, with the Power of Partnership™, we are improving lives for children, families, seniors and you; focusing our efforts together through Education, Income and Health

core values

- Caring:** We are committed to people helping people every day...one generation voluntarily and compassionately paving the way for future generations.
- Innovative:** Using the Power of Partnership™, we connect strengths, multiply resources, and create the best ways to make measurable improvements in local lives.
- Trustworthy:** We are the finest stewards of your donated time, ideas, and money.
- Leadership:** We initiate, influence, and support desired positive changes in our neighborhoods and communities.

our three areas of impact

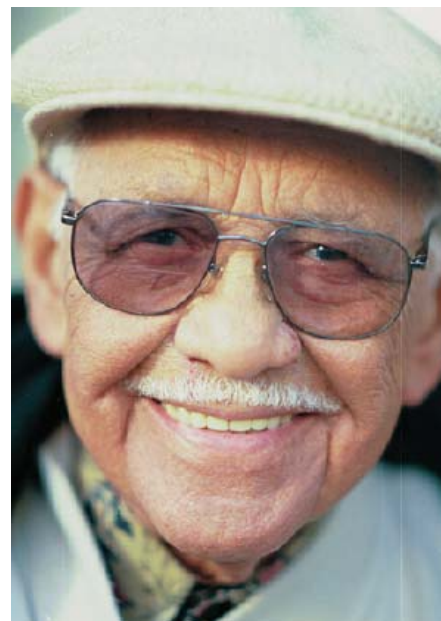
At United Way of Santa Barbara County, we are committed to creating lasting, measurable solutions. We bring together the best people and resources of our community and link them with initiatives and partnerships changing the future for local people in need. We focus on three areas of impact:

Successful Children & Youth



Strong Families

Independent Seniors



personal goals

goal 1: make 50-70 on-the-phone contacts with decision makers

You can help United Way develop new relationships by making calls (1) from a list of contacts provided by United Way, (2) from your personal rolodex or calendar for the upcoming month, (3) on individuals you already know within your division, and (4) to thank current supporters. Over the course of Campaign Cabinet, we are asking you to make an average of 5-7 calls per week. These calls set the stage for our face-to-face meetings.

goal 2: set a minimum of 5 face-to-face meetings

If you try to set a face-to-face meeting with every call, it should be easy to set at least 5 meetings. Invite United Way staff to any meetings that you set, and we will briefly meet beforehand to discuss our goals for the meetings. All calls must be completed by July 31, 2009, so schedule them soon.

goal 3: member recruitment

We would like each one of you to recruit a minimum of two new member to join the Campaign Cabinet. As you know, accomplishing our goals requires a constant infusion of new ideas and individuals. We therefore look forward to adding new leaders every year. You can target individuals who are friends of United Way and those who would be a good strategic placement (i.e., he or she works for a company we are targeting).

overall cabinet goals

goal 1: \$2million workplace campaign

In 2008, United Way's community campaign total was \$2,401,084. The workplace campaign portion totaled close to \$1.9 million. Workplace campaigns include employee gifts, corporate gifts and events.

goal 2: add 10 new employee campaigns

United Way of Santa Barbara County runs over 175 employee campaigns ranging from hundreds to hundreds of thousands of dollars raised. Our goal is to add a minimum of 10 new employee campaigns. We can tailor the campaign to fit the organization. United Way staff want to express, in person, the benefits of supporting United Way and needed services. Many campaigns hold presentations, fun events, and match employee gifts corporately to increase enthusiasm and help the community.

goal 3: add 10 new executive club members

United Way of Santa Barbara County recognizes the importance of executive involvement individually and in employee campaigns. We are recruiting at least 10 new Executive Club members for our 2009-2010 Annual Campaign. Executive Club members pledge at least \$1,200, run a successful employee campaign, offer corporate gifts as applicable, and understand the value of United Way. We thank our Executive Club members annually with a luncheon and full-page ads in major local newspapers.

goal 4: add 5 new corporate gifts/sponsorships

Local organizations can also give back to the community through corporate gifts and sponsorships. United Way requests underwriting for major events, and organizations can support specific programs, services, or areas of need with a corporate gift. We ask Campaign Cabinet to generate at least 5 corporate gifts or sponsorships this year. In most circumstances, our first goal will be to initiate an employee campaign, and we will ask for a corporate gift as a part of that campaign. Consult with United Way staff before your calls to prioritize our three goals for each of your prospective meetings.

member role and responsibilities

role

Build and strengthen United Way of Santa Barbara County's relationships with key business leaders and workplaces by providing peer-to-peer requests and recognition for involvement in our annual Community Campaign.

responsibilities

- Effectively communicate United Way's vision, mission, and values
- Make a personal pledge (as you are able) as a Pacesetter
- Complete all Decision Maker cultivation by July 31, 2009
 - Set a minimum of five face-to-face meetings
 - Secure involvement with United Way staff at meetings
- Attend Cabinet meetings prepared to report on your progress (calendar on back cover)
- Attend major events (Day of Caring, Red Feather Ball, Holiday Bash)
- Recognize/thank organizations, leaders, and division team members
- Notify United Way staff of all contacts made and respond to requests within 72 hours
- Evaluate individual/division performance to improve Campaign Cabinet

tips

To make your role easier, try the following approaches:

- Ask contacts from your personal rolodex/calendar to schedule a short, separate meeting to discuss how they can get involved individually or as an organization with United Way.
- Brainstorm what organizations/individuals within your division you need a reason to call. Call regarding United Way and use your new contact as a way to generate new business for yourself!
- Use United Way's generated list of prospects to call individuals you are familiar with.

frequently asked questions

What is United Way of Santa Barbara County?

Since 1923, United Way has held a reputation as this community's fundraiser. But, United Way does not just raise money. United Way brings people and resources together to create lasting, positive change in the lives that need it most. Today's United Way has a focused, results-driven system, working to help people live better lives. Through strong partnerships with volunteers, local business, government and nonprofit organizations, United Way accomplishes what no one can do alone.



Why give to United Way of Santa Barbara County?

Through funding, volunteer development, and leveraging dozens of local non-profit and public sector agencies, and directing our own unique multi-agency initiatives such as Fun in the Sun (a summer academic and behavior enrichment program for poverty-level and homeless children and their families), UWSBC seeks to create lasting, meaningful solutions rather than short-lived approaches to community problems.

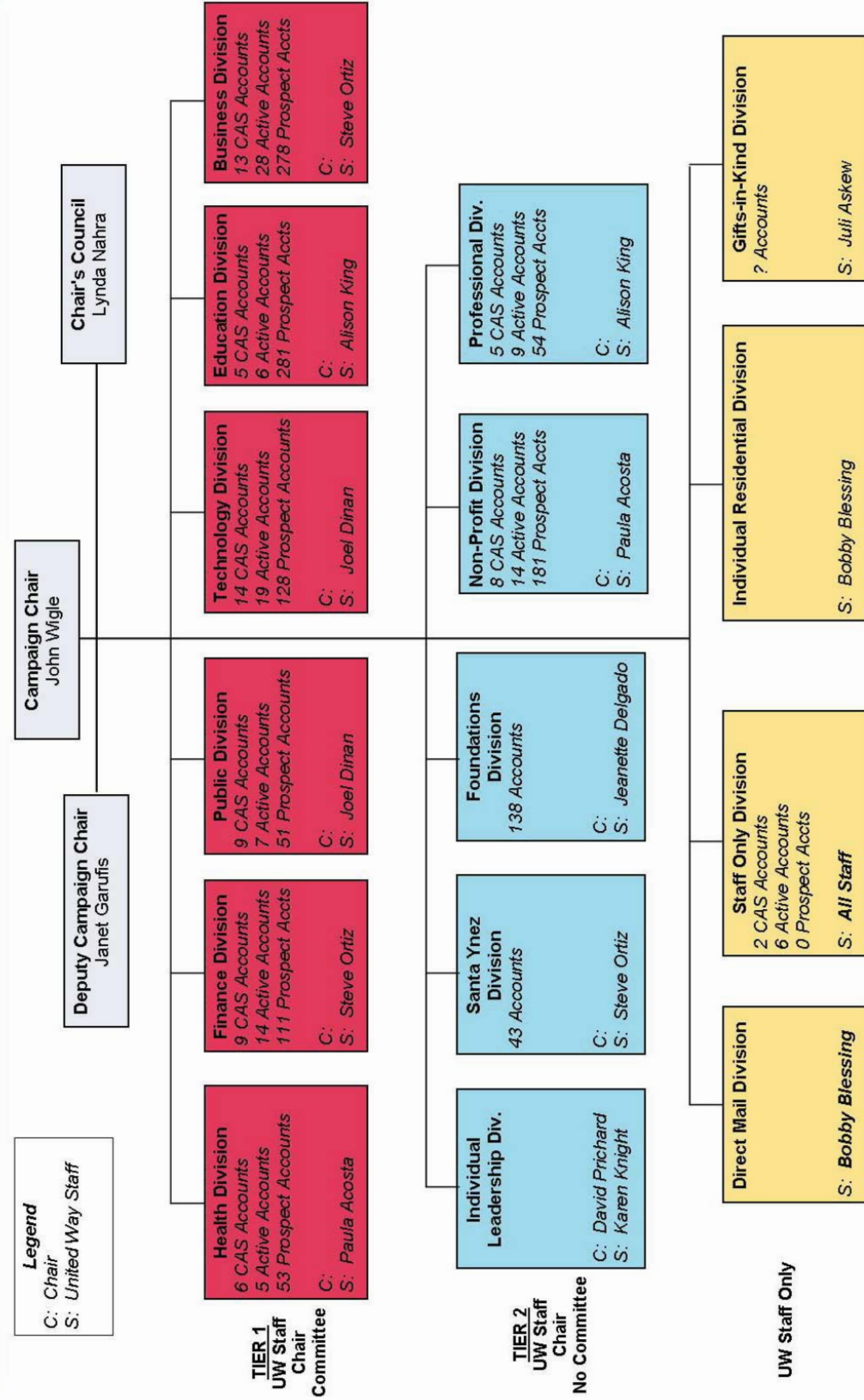


How does the **Power of Partnership™** work?

The *Power of Partnership™* agenda is shifting our focus from providing temporary solutions for pressing issues to analyzing the root causes of those issues and coming together with other community, business, government, and non-profit leaders to initiate long-term solutions. For example, our Fun in the Sun program does not simply provide a safe environment for low-income children during the summer. Through partnerships with over 35 organizations, 75% of the children also improve their reading scores. We could simply provide a safe place to go, or we could also equip low-income children to close the learning gap and become successful individuals. Life-changing results require the *Power of Partnership™*.

Who supports United Way of Santa Barbara County?

Over 175 workplaces and 6,000 individuals from Carpinteria to Santa Ynez contribute to our programs every year. Over 3,000 volunteers contribute time and energy to us as well. Those contributions of time, money, and ideas reach more than 80,000 people in need--that's one in three local residents!



division descriptions

The chart on page 3 shows our Campaign Cabinet Divisions for our 2009-10 Community Campaign. The Campaign Cabinet structure has three tiers, based on the level of involvement from Campaign Cabinet members.

tier 1: division chair & committee

Business Division
A variety of wholesale, retail and service organizations with the potential to pledge corporately and run an employee campaign.

Education Division
Institutions providing educational services including both public and private schools ranging from elementary to college/university level.

Finance Division
Organizations, and individuals providing financial services, including banking, lending, and investing.

Health Division
Health care service providers such as clinics, dentists, hospitals, laboratories, physicians, retirement centers, and veterinarians.

Non-Profit Division
Public benefit organizations, many of which partner with United Way to provide services to our county.

Professional Division
Individuals and organizations providing self-directed professional services, such as real estate, tax planning, accounting, legal counsel, architecture and design.

Public Division
Employees from city, county, state, and federal government offices in south Santa Barbara County.

Technology Division
Private sector technology businesses specializing in software/computer, biotechnology, telecommunications, and other specialized, technical fields.

Individual Leadership Division
Giving societies and outreach for individuals from home and workplace pledging over \$1,000.

Santa Ynez Division
Organizations based out of the Santa Ynez Valley from all industries.

tier 2: united way staff only

Foundations Division
Foundation grant requests for United Way-driven initiatives and partnerships.

Gifts-in-Kind Division
Organizations from whom we request goods and services; not suited for employee/corporate involvement.

Individual Residential Division
Residential donors below the Leadership level, mainly outreach through direct mail.

Staff Only Division
Organizations requesting/requiring minimal contact, handled only by staff.

Direct Mail Division
Individuals Outreach through Direct Mail Only.