

EMPLOYEE CAMPAIGN FLOW

PERSON RESPONSIBLE	ACTIVITY	DAYS PRIOR TO KICK-OFF	TARGET DATE
PRE-CAMPAIGN	1. Hold Planning Meetings with:		
	• United Way Representative	30-60 days	_____
	- Review past results and develop campaign strategy		
	• Meet with CEO to:		
	- Secure signed letter of endorsement to employees		_____
	- Secure attendance at group meetings		
	- Secure payroll deduction authorization		
	- Implement early Senior Management campaign		
	- Finalize amount of corporate gift		
	2. Build Campaign TEAM		
	• Hold planning meetings with team to discuss ideas, responsibilities & dates re:	10-50 days	_____
	- Establish goals & timeline		
- Establish group solicitation meetings with one-to-one follow-up schedule			
- Schedule training for all TEAM members			
- Develop campaign theme			
• Request employee campaign supplies from United Way	10-40 days	_____	
3. Heighten Awareness			
• Arrange tours of United Way supported services	7-40 days	_____	
• Complete senior management campaign	6-25 days	_____	
• Publicize campaign:	5-20 days	_____	
- With posters/testimonials tour letters			
- Senior management campaign results			
4. Prepare for Kick-Off			
• Personalize pledge cards with each employee's name	5-15 days	_____	
• Scheduled employee group solicitation meeting for groups of 10-40	5-12 days	_____	
• Send letter from CEO to all employees	5-10 days	_____	
• Tour United Way supported services and publicize reactions	3-10 days	_____	
• Check supplies, timeline, and all involved parties	2-5days	_____	
CAMPAIGN	5. Conduct Campaign		
	• Hold fun and festive kick-off event	Day of	_____
	• Begin immediately to conduct group solicitation meetings	0-5 days	_____
	• Begin one-to-one follow-up on non-attendees immediately	1-5 days+	_____
• Retrieve all pledge cards and complete all solicitations	5-15 days	_____	
POST-CAMPAIGN	6. Complete Campaign		
	• Compile results of campaign & publicize results	6-16 days+	_____
	• Complete United Way Final Report form and send copy to United Way	6-16 days+	_____
	• Evaluate campaign strengths & weaknesses and make written recommendations for next year's employee campaign manager and United Way	10-20 days	_____
• Thank all employees: posters, memos, brown bag lunch, etc. <i>Celebrate!</i>	10-20 days	_____	

In our community,

**United Way
of Santa Barbara County**



*Your step-by-step
guide to running a
successful United
Way campaign.*



**Campaign Manager's
Guide
2009/10**

...everyone has a hopeful future.



**United Way
of Santa Barbara County**
320 E. Gutierrez Street Santa Barbara CA 93101
PH: 805-965-8591 FX: 805-962-3461 www.unitedwaysb.org

Welcome to a successful United Way Campaign!

Thank you for being an Employee Campaign Manager (ECM) for your organization's United Way campaign! Your role is critical to the success of your company's campaign and to thousands of children and families who will benefit directly from your efforts.



This how-to guide will:

- Answer your questions
- Give you step-by-step instructions
- Suggest timelines
- Offer creative campaign ideas

...so that you can run the best United Way campaign with minimal time and effort.

What is United Way of Santa Barbara County?

Mission In our community, everyone has a hopeful future.

Vision Right here, right now, with the *Power of Partnership*[™], we are improving lives for children, families, seniors, and you!

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.

Personal Pledge Form

Please strengthen the *Power of Partnership*[™] and improve lives by completing the information below

1 Personal Information

NAME: TITLE, FIRST, MIDDLE, LAST, SUFFIX _____

EMPLOYER NAME _____

DEPARTMENT AND JOB TITLE _____

WORK ADDRESS _____ ZIP CODE _____

HOME ADDRESS _____

CITY _____ STATE _____ CA _____ ZIP CODE _____ BIRTHDAY (YEAR OPTIONAL) _____

WORK/DAYTIME TELEPHONE _____ HOME TELEPHONE _____ GENDER M F

EMAIL ADDRESS _____

Please contact me about: Newsletter/e-News Volunteer Opportunities Thank-You Report

2 Pledging Options

I continuously pledge through the following method (choose A, B, or C):

A PAYROLL DEDUCTION

1. I want to contribute the following amount each pay period (choose one):

\$200 \$75 \$20

\$150 \$50 \$10

\$100 \$25 \$5

Other: \$ _____

Leadership Circle gift: \$ _____ (\$1,000 or more annually: see back for details)

Match community average gift (\$312 annually)

B CREDIT CARD OR DEBIT GIFT

1. Charge my: Visa, MasterCard, Discover, or American Express:

a. Each gift: \$ _____

b. Number of deductions per year: monthly or _____ month(s)

c. Start date: _____/01/____

d. Card: _____

e. Expiration date: _____/____/____

OR

2. Automatic monthly checking account withdrawal (REQUIRED: voided check)

Monthly gift: \$ _____

C ONE-TIME GIFT:

\$ _____

Cash/check (enclosed)

Stocks (call 965-8591 x124)

ENDOWMENT AND GIFT PLANNING:

Please tell me about:

Heritage Club

Including United Way in my will

2. Number of pay periods per year: _____

3 Signature _____ **Date:** ____/____/____

Thank you for investing in the *Power of Partnership*[™]

Sample Pledge Form

4 Annual Restricted Giving

OPTIONAL: choose any of the following categories below: *Any gift under \$100 per restriction per year will be considered a gift to the Community Care Fund. **Amount:** (Total below)

A GEOGRAPHIC AREA/SPECIFIC CHARITY*

Restrict my gift to (charity or community): Address: _____ City/State/Zip: _____ \$ _____

B COMMUNITY CARE FUND*

The Community Care Fund supports over 75 programs and partnerships changing the lives of local children, families, and seniors in need. We use the *Power of Partnership*[™] to connect the best resources of Santa Barbara County and make the greatest long-term impact on pressing needs. Your gift to the Community Care Fund supports the *Power of Partnership*[™] and strengthens all three of our Areas of Impact.

C AREAS OF IMPACT*

Area of Impact	Percentage	Amount
Successful Children & Youth (Code 91598) Ensuring all children enter school ready to learn and educating youth for responsible adulthood	59%	\$ _____
Strong Families (Code 91600) Promoting loving and supportive environments for all types of families	23%	\$ _____
Independent Seniors (Code 91599) Encouraging greater independence for seniors and their caregivers	18%	\$ _____

Total Restricted: \$ _____

5 Leadership Recognition

My annual gift of \$1,000 or more qualifies me for the Leadership Circle.

United Way of Santa Barbara County's Leadership Circle provides a crucial base of support for sustaining current programs and reaching unmet areas of need. 7% of our donors are Leadership Circle members, but they raise 37% of our total. We thank our Leadership Circle members by name in our major publications.

Leadership Circle	Total Annual Gift
Leadership Circle	\$1,000-\$2,499
Bronze Member	\$2,500-\$4,999
Silver Member	\$5,000-\$9,999
Gold Member	\$10,000 or more

My name will appear as listed on reverse side.

Please list my/our name(s) as follows: _____

I prefer that my gift remain anonymous

I also qualify as a United Way Community All-Star. All-Stars enable us to use donations most effectively by contributing a net gift of \$500 or more to the Community Care Fund (unrestricted dollars) or United Way's initiatives.

More Ways to Stay Involved!

Be a part of our *Lunch Bunch!*

Just take your lunch break with some kids who need you. During **June, July & August**, you can come out for an hour and to play with children who are income-qualified for the program. You can make a difference in their lives just by playing, hanging out and encouraging them. How many opportunities do you have to change a life at lunch?

Day of Caring

Join us and thousands of community volunteers on **Saturday, September 19, 2009**. You will help local non-profits accomplish projects like painting, cleaning, yard work and organizing, that they have been waiting for all year. Day of Caring is a great way to join the community in caring for itself, to get connected to local non-profits, and to make a difference to those in need.

Attend our Red Feather Ball

Saturday, October 10, 2010, the All-Star Red Feather Ball is held. A great chance to celebrate United Way! Bid on silent and live auction items, dance the night away, all the while supporting locals in need.

Holiday Bash

The **First Wednesday of December** at Fess Parker's DoubleTree Resort, gather with other members of the community who have participated in United Way's annual campaign. It is a time to celebrate the holiday season, as well as the success to date of the year's campaign. An evening full of food, cocktails, friends, and fun!

Annual Awards

ends to current campaign season. A dinner and awards to help celebrate and appreciate the people and organization's that have made the current year's campaign be a success. Please join us for an evening you're sure not to forget!

If you are interested in more information regarding these opportunities please contact our offices and check out our website.



United Way of Santa Barbara County
 320 E. Gutierrez Street | Santa Barbara | CA 93101
 PH: 805-965-8591 | FX: 805-962-3461 | www.unitedwaysb.org

United Way Impact Areas

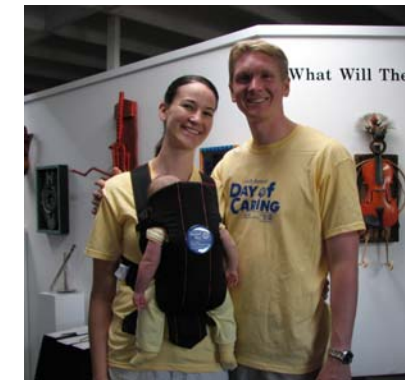
At United Way of Santa Barbara County we are committed to creating lasting, measurable solutions. We do this by bringing together the best people and resources and linking them with those in need. We focus our efforts together through **Education, Income and Health**.



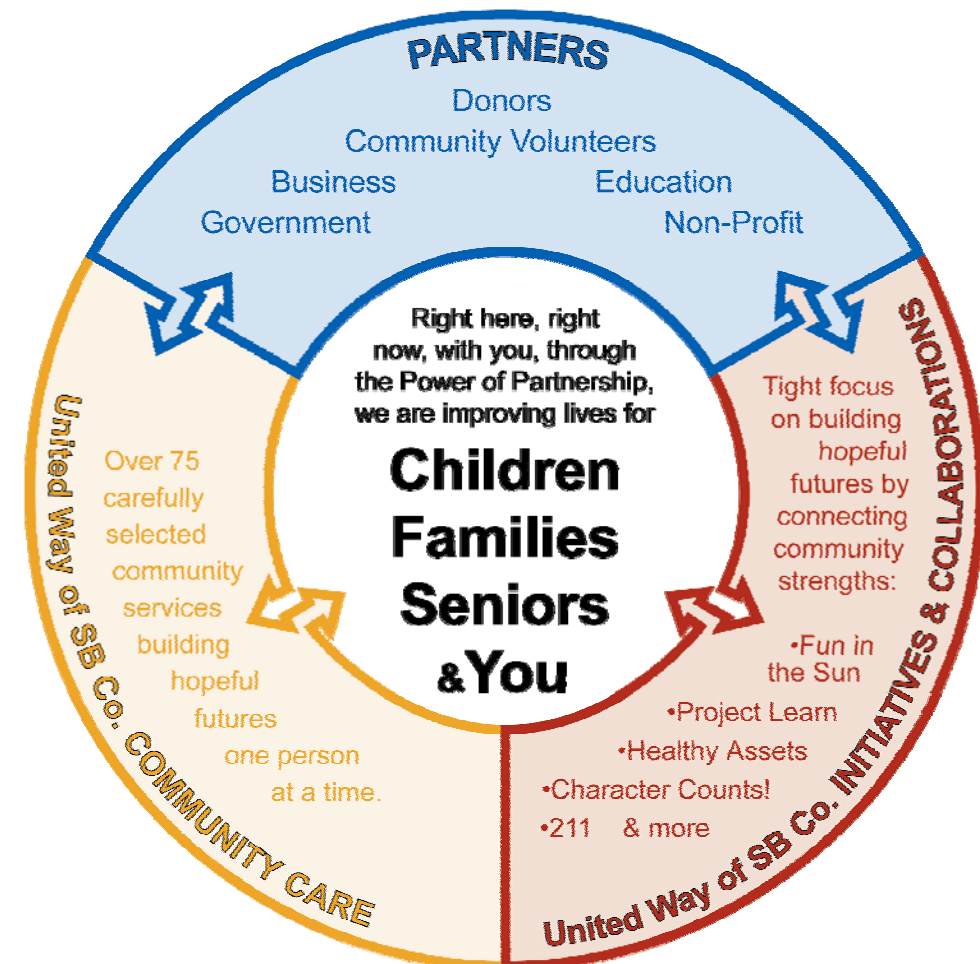
successful children



independent seniors



strong families



Frequently Asked Questions

Why give to United Way of Santa Barbara County?

No other organization can leverage resources, public and private, for our local communities like United Way.

What is UWSBC?

Established locally in 1923, Santa Barbara County's United Way has been working year-round to involve people—through contributions of money and time—to provide a vital network of services to people in need.

How much of my contribution works to help people in Santa Barbara County?

100% With Santa Barbara County's United Way, your gift stays here.

What are your costs?

Budgeting less than 18% for operation expenses Santa Barbara County's United Way operates with half of the overhead expenses of national charities— United Way is your best investment in Santa Barbara County.

What is UWSBC's value?

With one gift to Santa Barbara County's United Way, you make possible the *Power of Partnership™* focused on three major focus areas: children, families and seniors. With every United Way contribution, more people are helped in more ways.

How does UWSBC save me time & money?

With over 1,000,000 charities in the USA and 40,000 new ones formed each year, how do you know who's doing a good job? Nearly one hundred local volunteers provide investment oversight. They visit, examine and evaluate hundreds of programs to pick the best and most needed ones. These volunteers do what none of us individually has the time to do, to investigate every request for a contribution. United Way of Santa Barbara County improves our community—by investing in United Way you become part of the positive changes we initiate.

Who supports United Way of Santa Barbara County?

Over 12,000 of your neighbors, from Carpinteria to Santa Ynez, make a contribution that helps improve the lives of more than 80,000 people each year—more than one in three local residents.

United Way
of Santa Barbara County



Follow Up with Employees

ENSURE THAT EVERYONE HAS THE OPPORTUNITY TO GIVE.

Because some employees will not be able to attend or will not have made their decision at the presentation, it is critical that they are contacted. Many donors want to continue their involvement but forget or don't know when the campaign is over. Checking with employees (with no pressure or obligation) can involve more people that wanted to give.

Best ways to ask...

Know the facts: Read background material, ask your UW representative questions, check out www.unitedwaysb.org. Know the unique value of United Way of Santa Barbara County.

Make personal contact: People give to people. Set up face-to-face meetings to ask for a pledge. It's best not to just leave pledge cards on desks.

Call on co-workers you know first: Approaching people you know lets you be more relaxed and comfortable as you refine your presentation skills. The positive responses you'll get will boost your confidence.

Be prepared for questions & concerns: People deserve to know that their money is being used wisely. Review the responses to the FAQ's (see page 4). If you don't know the answer to a question, please ask your UW representative. You won't hurt their feelings by asking tough questions, and your coworkers deserve real answers, not rumors.

Say "Thank You!"

Announcing the totals reached, in dollars and participation is a key element to a successful campaign. It helps employees to know that their contributions really added up, to feel a sense of completion and accomplishment.

A Few Thank You ideas:

- Email/Poster/Flyer announcing totals
- Morning bagels, donuts, or cookies in break room with flyers
- Ice cream social
- Thank you breakfast
- Wine & cheese reception
- Hold the raffle drawing and announce totals
- Distribute 'Thank You Flyer' (found on CD)
- Sign up for E-News & Print Newsletter from United Way to inform all of what their dollars are making possible!

Conduct Campaign

EVENTS: AN OPPORTUNITY FOR WORKPLACE FUN AND FUNDRAISING.

This is a time to really make a United Way campaign something **fun**, that employees look forward to every year. Think of it as an opportunity for workplace camaraderie and fun, all while **helping** the community!

Try to specialize events to your workplace and tailor it to the size of your organization. An event can be a small rally, or a large party, you decide. What kind of things get people excited? What hobbies or talents do employees have that could be incorporated? Is someone in a band? Are there great cooks? Check out some of these ideas and think about your organization.

Small:	Medium:	Large:
*BBQ	*Silent Auction (see prizes ideas in incentives & on CD)	*Benefit Show (i.e. band, hypnotist, etc)
*Pot Luck	*Walk for United Way	*Carnival
*Bake Sale	*Pep Rally	*Candy grams
*Cook-Book	*Sports (Softball tournament)	
*Cook-Off	*Dunk Tank	
*Breakfast	*October Fest	
*Ice Cream Sundaes	*Fiesta	
*Dollar an Inch	*Casino Night	
*CEO Carwash	*Executive Prison	
*Bingo	*Balloon-Pop	
*Used Book & Movie Sale	*Luau	
*Coin War		

Raffles: Raffle drawings are fun for all sizes of organizations. They can encourage employees to participate and thank them for giving. Raffles can be a separate fundraiser or linked to pledging.



In past years, **CenCal Health** (formerly Santa Barbara Regional Health Authority) held a **Halloween Carnival** for United Way. Each department dressed up and competed in a costume contest and other businesses and children were welcome. There were games, dunk tanks, baked goods, a tri-tip BBQ, and music.

Tailor your event to your company. **QAD** had a “passport” event, where employees received “passports” that were stamped at different informational booths. The booths mirrored QAD’s own marketing campaign, and catered snacks were served.



Go to our website to access campaign event ideas and Materials to print: www.unitedwaysb.org

STEP 7

Introducing: Your Eight Steps to Success

→ Establishing a timeline for these activities is key, fill in the times and dates. Community-wide events are on back page.

STEP 1 Involve CEO and Send Endorsement Letter

- Secure letter of endorsement.
- Payroll deduction and employee attendance at group meetings.

STEP 2 Customize Your Campaign

- Involve the entire organization
- Make people feel special
- Get people involved year round
- Have fun

STEP 3 Publicize Campaign

- Flyers, posters, post results, send emails, generate excitement

STEP 4 Kick-Off Event

- Plan an event to start the campaign, a breakfast, raffle, ice cream social, pot luck lunch. Pick a theme, have fun.

STEP 5 Presentations

- Hold group meetings, begin one-on-one follow-up

STEP 6 Identify and Recognize Leadership Givers

- Show your company is a leader in caring for our community.
- Let us say “thanks”

STEP 7 Conduct Campaign

- Have fun with CEO carwash, BBQ, bake sale, dunk tank candy-grams, balloon pop.

STEP 8 Follow Up with Employees

- Give everyone an opportunity to give. Thanks!

CEO Involvement & Letter

THERE ARE MANY WAYS FOR A CEO TO BE INVOLVED.

- **The Letter:** Having a letter signed by the CEO distributed to all employees reassures them that Santa Barbara County's United Way is a great investment. See sample below.
- **Authorize a Challenge:** A challenge is often directly related to reaching campaign goals. Fun incentives for reaching a campaign goal will be covered in Step 5. Challenges may also involve the CEO personally. If a goal is met he/she will give up their parking space for a week, cut their hair, work as the evening janitor, etc. to show their true support.
- **Consider a Company Match:** A CEO may endorse a full or partial match of employee contributions to Santa Barbara County's United Way, out of a corporate budget. This stretches the contributions of donors and makes giving at work an even greater incentive.
- **Join the CEO Club:** CEOs who chose to pledge at the Leadership level become members of our CEO Club and are recognized in publications and local newspaper ads three times a year.
- **Allow time for United Way:** A CEO can make a difference simply by letting employees know that they have time to attend a presentation or work on a United Way campaign. For those in charge, this may include taking a few things off of their plates. For Campaign Managers and Committee Members this might mean easing the workload during the campaign.

Success Tip:
Involving the CEO is one of the most important steps to a truly successful campaign.

Go to our website to access CEO Involvement letters and materials to print: www.unitedwaysb.org

Your Workplace
Santa Barbara, Ca

Dear Employees,

Many of you have never participated in giving to United Way. This year we are running a United Way campaign and I want to let you know why I believe in what this organization is doing.

To let you know who they are, each United Way is independent and autonomous. Santa Barbara County's United Way has been working with the local community for over 83 years. The funds raised here stay here and help to fund over 80 different community programs, as well as new and exciting initiatives to help meet local needs.

Did you know that in our own county there are over 3,000 homeless children each year? Can you imagine, for example, living on a combined income of less than \$25,000 a year? About a quarter of OUR neighbors do. There are real needs right here.

Santa Barbara County's United Way is a trustworthy organization. They are working hard to affect the community in a major way. Please spend time learning more about them, and I encourage you to get involved in giving back to the community.

Your gift is entirely confidential and is a personal matter. Find what you can give, maybe a hour of your pay a week or a gift at the leadership level, but it is a way to make your working here at _____ a meaningful way of giving back.

Thank you,

CEO
CEO

Identify and Recognize Leadership Circle Members

RECOGNIZE OUTSTANDING CONTRIBUTORS

Leadership support is tremendously important to the community campaign. Participation in United Way's individual Leadership Giving Program provides the opportunity for recognition at on of the following levels of giving:



Tocqueville Society:
Gifts of \$10,000 and more

Leadership Circle:
Gold Circle: Gifts of \$6,000-9,999
Silver Circle: Gifts of \$3,000-5,999
Bronze Circle: Gifts of \$1,200-2,999

The Individual Leadership Giving Program allows individual recognition for outstanding contributions. By providing United Way with names of individuals who gave \$1,000 or more, you show that your company is a leader in caring for our community. You also give us a chance to join you in saying "thanks."

Let the community know that you have exceptional employees who are doing making their community a better place



Presentations

PRESENTATIONS ARE THE HEART OF THE SUCCESSFUL CAMPAIGN.

This is the time where people can hear firsthand about what United Way of Santa Barbara County is doing in the community, and learn how they can partner with us. Group presentations should include all employees in groups of 10-40.

The meeting should include the following steps:

- Pass out personalized pledge cards if not already done
- Follow a timed agenda
- Collect cards as employees leave

Success Tip: Make it fun! If you feed them, they will come! Have a raffle for those who attend. The most effective presentations are during meetings that are already taking place.

Ideas for fun presentations:

- ▶ Pizza, sandwiches, or even just ice cream
- ▶ CEO or management introduces campaign
- ▶ People share personal United Way stories
- ▶ Video

Leadership Presentations:

Leadership giving is commitments to changing the community through power individual gifts. A leadership campaign at your workplace for top level management increases campaign results dramatically.

- Hold a special presentation or luncheon for these invitees, ideally around a regular management meeting
- Have personalized pledge cards for each attendee
- Your United Way representative will present a special PowerPoint with more in-depth information. Please schedule about 30 minutes
- Report results : show the impact that the management/leadership presentation has on the overall campaign goal.

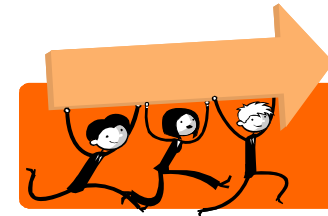
Giving Levels	
Alexis de Tocqueville Society	\$10,000 +
Gold Circle	\$6,000 - \$9,999
Silver Circle	\$3,000 - \$5,999
Bronze Circle	\$1,200 - \$2,999
Ambassadors Club	\$500 - \$1,199

Go to our website to access presentation and Leadership materials to print: www.unitedwaysb.org

Customize Your Campaign

BE FUN AND INFORMATIVE AT THE SAME TIME.

Unique approaches and giving incentives work very well to get people enthusiastic and motivated to participate in the campaign. Many of these are available at a discount or no cost from our vendors and caring community retailers. Add a kick to your campaign by making it fun and informative!



Involve the entire organization!

- Allow time to involve employees in the campaign
- Arrange tours of funded services
- Arrange for employees to volunteer
- Campaign updates in company publications
- Participate in "Day of Caring"



Have some fun team building!

- Hold a company picnic
- Hold an ice cream social
- Keep track of campaign progress—use a thermometer, or fill a jar with jelly beans
- Send press releases to newspapers and other publications to highlight your events
- Visit our website www.unitedwaysb.org/worktoolkit.htm for dozens of ideas to put the "fun" back into fundraising.



Get involved year-round!

- Use feature stories in your newsletter
- Display posters year-round
- Thank employees for community support
- Distribute Contributor Surveys to employees, and publish the results
- Create a bulletin board for community calendar activities and special programs
- Publicize UW as a 365-day a year organization that seeks to help local people right here



Arrange a drawing for prizes!

- A paid day off
- A special parking spot
- Tickets to sporting/arts events
- Gift certificates
- Baked goods, employee artwork, etc.



Make people feel special!

- Senior managers serve food or dessert
- Give balloons to campaign meeting attendees
- Host a "Recognition Day" for employee volunteers
- Ask volunteers and/or clients from a funded service to talk to your employees
- Place surprise candy or fruit at each employee's work location
- Produce humorous/informative payroll stuffers

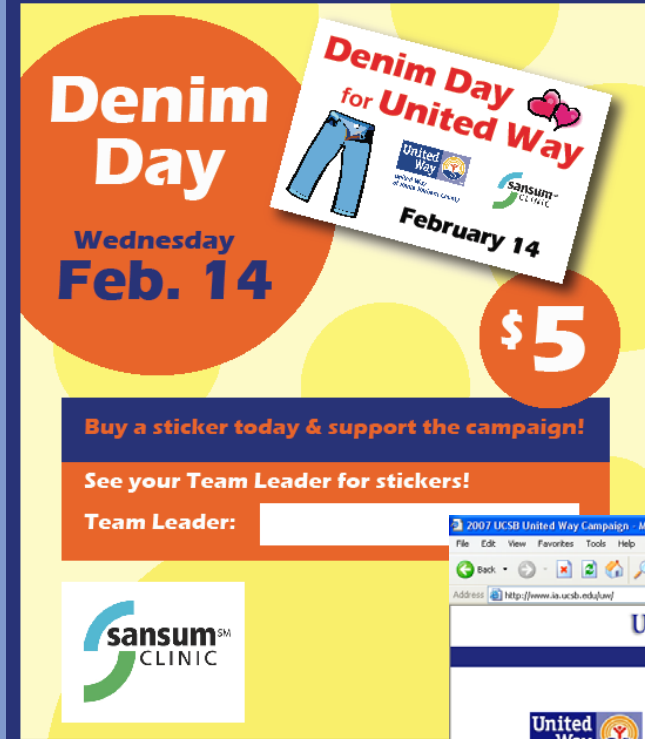
Publicize the Campaign

PUBLICIZING YOUR CAMPAIGN IS A KEY TO SUCCESS!

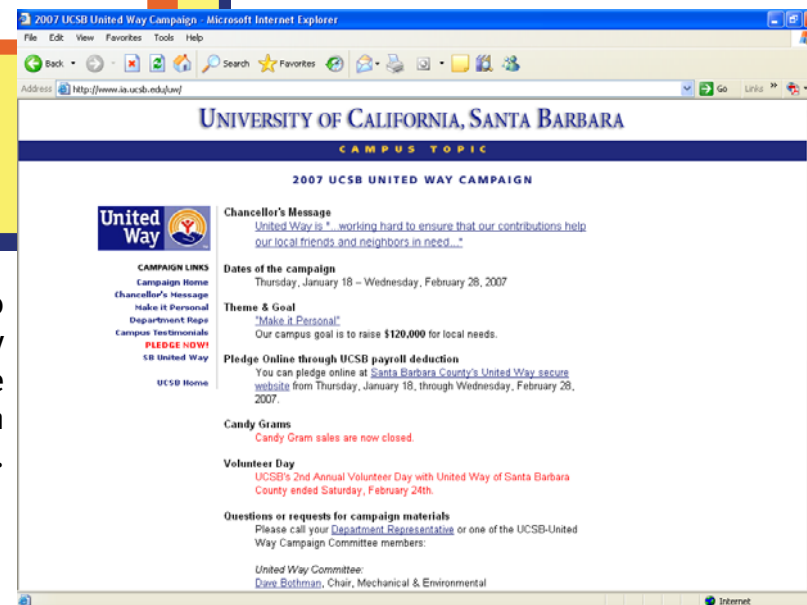
Employees are only going to participate if they know the campaign is happening! Think about the most effective way to get the word out, depending on how you communicate at work. Ensure that employees are aware of **ALL** campaign dates, times, events & incentives.

- Hang up Posters
- Distribute invites
- Send email reminders and updates
- Utilize company website
- Promote the campaign in your company newsletter
- Make the break room “campaign central” - provide reading material about United Way of Santa Barbara County.

2007 United Way Campaign “Together, We Can Make a Difference”



Also, making campaign fliers visible to your clients and the public is a great way to show your support and involvement as a community– building partner. Sansum’s United Way campaign flier encouraged great participation in their jeans day!



UCSB uses their website to promote their United Way campaign and give employees campaign information and dates.

Go to our website to access publicity fliers and materials to print: www.unitedwaysb.org

STEP 3

Kick-Off Event

A KICKOFF EVENT SIGNALS THE START OF YOUR CAMPAIGN.

An event could be any number of things big or small.

- Bagels, breakfast burritos, flyer & email
- Gather the employees for a quick stand up meeting
- Have a potluck lunch
- United Way “quiz” and prizes
- Set up balloons and décor in the staff lounge or lobby
- Have a used book sale
- Play employee bingo at lunch
- Costume or crazy hat contest

Whatever you choose have fun & let people know that the campaign has begun!

Want people to come to your kick-off? Nothing says “fun” and “involvement” like:

Food :

Having food at your events is a great way to maximize everyone’s time, and to entice some people who may not otherwise come. If something like a pizza lunch is not in the budget, consider ice cream sundaes (very inexpensive), or a potluck.

Prizes:

Who doesn’t love prizes? You could hold a balloon pop, a silent auction, or the ever-popular raffle drawing. See Step 5 for more ideas.



County of Santa Barbara’s Campaign Kickoff Event

Go to our website to access kick-off fliers and materials to print: www.unitedwaysb.org

STEP 4