



Live United
Give.Advocate.Volunteer.

2016 Campaign Coordinator Guide and Tool Kit

United Way Mission Statement

Mobilize community resources to measurably
improve people's lives

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Congratulations!

As a company coordinator, you've been selected for a very important job by your organization. Your efforts to raise money for United Way will affect thousands of people, and will have positive results for Island County all year long.

Your role is to provide leadership for your company's employees, and their United Way campaign. Your organizational skills and creativity are essential for bringing the necessary resources together to design a campaign plan that will achieve success.

This guide is designed to help you run an effective employee campaign. We have found that if you follow the nine easy steps outlined below, the result is a fun and successful campaign experience! Good luck as you begin your important work for the people in YOUR community.....and on their behalf, thank you for caring.

Top 9 Ways to run a campaign:

- 1. Get Top Level Support**
- 2. Develop a Campaign Committee**
- 3. Set a Challenging Goal**
- 4. Make Giving Simple - Set up Payroll Deduction**
- 5. Select a Solicitation Technique**
- 6. Select and Train Solicitors/Volunteers**
- 7. PLAN!**
- 8. Implement Your Campaign**
- 9. Follow through, Report Results, Say Thank you!**

1.

Get Top Level Support:

Keep your CEO informed and involved by asking them to:

- _____ Endorse the campaign strategy.
- _____ Help identify additional team members that will adequately reflect the employee workforce.
- _____ Send personal letters of endorsement and thank you letters to employees.
- _____ Allow for payroll deduction.
- _____ Make a few brief statements to each group solicitation endorsing the company's commitment to Island County with the United Way, and speak to the credibility of United Way here in our county.
- _____ Approve incentives to be used for the campaign. (Remember, these do not always have to be monetary)
- _____ Ask the CEO to solicit or engage the top management in giving at a leadership level to set the pace for giving, and provide leadership by example.

Best Practices

One company chose to use the theme, *Building A Better Community*. Each plant was challenged to build buildings, people, vehicles and bridges with large Legos. Each donor name was recognized on a Lego. Each plant's handiwork was brought to the main plant to build an entire town of Legos and celebrate their success by having a huge pizza party. The Legos were then donated to various children's programs.

Sample CEO Endorsement Letter

Dear Employees:

I support United Way, and I encourage you to learn about the organization that helps our county day-in and day-out. This year, our company will contribute a corporate investment of \$_____ to United Way of Island County. Our employee goal is \$_____. We have signed on to be a 2016 supporter, and we need to increase our participation to meet our goal.

The dollars raised will be used to help fund numerous programs that provide our community with local health and human care programs, youth development, activities for senior citizens, crisis services, learning centers and basic needs assistance.

Your investment this year is more important than ever. Because of the slowing economy, many Island County residents have already begun to seek help from member agencies for the first time: food pantry requests are increasing, hard-working families are asking for help. With your help, United Way agencies will be available to assist them.

Please join me in sharing with United Way of Island County. In the coming weeks, United Way presentations will take place here. Attend the 15-minute program, listen to the information, ask questions, and decide for yourself how much you can give to help others.

You can donate through payroll giving. Just pledge a small investment from each paycheck. It will automatically be deducted and will add up to a substantial total that will help our community be a better place to live. Because we need to LIVE UNITED.

Sincerely,

Chief Executive Officer

Sample Bulletin Board Announcement for Employees:

Dear Employees,

(Our company's) leadership and service to our community shows by how willing we are to take the next step and do what matters. Once again, we are taking a leadership role in the 2016 United Way campaign.

United Way is about making a difference in our community. (Our company) wants to help others as well. Together we will be a great partner.

Community Matters. United Way and (Our company's) experience tells us that the best way to help the most people is to focus on the root causes of the most serious problems. It takes all of us working together to pull it off.

Partnership Matters. United Way is bringing together people from all across the community—people from government, business, faith groups, nonprofits and ordinary citizens—to tackle the issues that matter most. United Way needs (Our company).

Live United. Open Your Heart, Lend Your Muscle, Find Your Voice. United Way is working to advance the common good by focusing on education, income and health. These are the building blocks for a good life— a good quality education that leads to a stable job, enough income to supporting a family through retirement, and good health. United Way's goal is to create long-lasting changes that prevent problems from happening in the first place. **LIVE UNITED –living united means being part of the change.**

(Our company) knows that's what matters to you too.

This year we will challenge ourselves to increase _____% our overall participation and our giving level. (Our company's) goal is \$_____ this year. The theme for our campaign is "**(Theme)**" and we will have a great time with fun events!

If you're looking for a way to make a real difference in your community, United Way is your best shot. We don't have to tell you what's wrong and what's needed. Most of you already know.

The work United Way does in this community is your work. It's your help which is getting assistance where it's needed. It's your concern that is changing people's lives. You want to make a difference? **So do we.**

Please consider supporting the United Way of Island County in raising \$350,000 this year.

I invite you to LIVE UNITED.

John/Jane Doe,
(Our company's) CEO

Sample Thank You Letter

Dear Employee,

Thank you for helping (our company) and United Way make a difference here in Island County. Your investment matters. By contributing to the United Way Community Investment Fund, you have invested in the building blocks for a good life:

EDUCATION—Helping families become financially independent and stable
INCOME—Helping children and youth achieve their potential HEALTH—
Improving people’s health

You have joined others who are creating lasting changes by advancing the common good.

Again, thank you! This could never be accomplished without you. Together we can inspire hope and create opportunities for better tomorrow. That’s what it means to LIVE UNITED.

Thank you,

John/Jane Doe,
(Our company’s) CEO

Sample E-Messages

E-mail is an easy, effective way to keep people in the know. The following messages are in a specific order that provides a clear picture of what United Way does. Please send them in this order during your campaign. Try personalizing the messages by adding information about your company's involvement with United Way.

Message 1

Live United. Open Your Heart, Lend Your Muscle, Find Your Voice. United Way is working to advance the common good by focusing on education, income and health. These are the building blocks for a good life— a good quality education that leads to a stable job, enough income to support a family through retirement, and good health. United Way's goal is to create long-lasting changes that prevent problems from happening in the first place. **LIVE UNITED –living united means being part of the change.**

Message 2

Advancing The Common Good-Advancing the common good means creating opportunities for a better life for all. Education, Income and Health-There are basic things that we all need for a good life: a quality education that leads to a stable job, income that can support a family through retirement and good health. **LASTING CHANGES**-United Way's goal is to create long-lasting changes by addressing the underlying causes. **LIVE UNITED**-Living United means being a part of the change.

Please give to the United Way of Island County. Need help? Call 360-675-1778.

Message 3

United Way of Island County constantly works to make sure it remains one of the most efficient charities in the nation.

Your invest matters, please give to the United Way of Island County. Need help? Call 360-675-1778.

Message 5

Your United Way invest stays in your community, Island County improving lives each day.

Your investment matters. Please give to the United Way of Island County. Need help? Call 360-675-1778.

Message 6

How To Live United. Join Hands, Open Your Heart. Lend Your Muscle. Find Your Voice. Give 10%. Give 100%. Give 110%. Give an Hour. Give a Saturday. Think of *WE* before *ME*. Reach Out a Hand to One and Influence the Condition of All.

Your invest matters. Please give to the United Way of Island County. Need help? Call 360-675-1778.

Message 7

How To Live United in Island County: Join Hands, Open Your Heart, Lend Your Muscle. Find Your Voice. Give a Saturday. Think of We Before Me. Reach Out A Hand to One and Influence the Condition of All. **GIVE.ADVOCATE. VOLUNTEER. LIVE UNITED.** Want to make a difference? United Way is creating lasting change, by focusing on education, income and health. That what is means to Live United. www.unitedwayic.org.

Message 8

- Thank you for creating opportunities and inspiring hope for a better tomorrow. Give.Advocate.Volunteer, **LIVE UNITED.**
-

Again, thank you. Working together, we get the results our community needs.

2.

Develop a Campaign Team:

- If you are a campaign coordinator at a large business (over 100 employees), **DON'T TRY TO DO IT ALONE!**
- Committee members should be viewed as effective leaders within the organization.
- In general, the **team** should not be less than 3, and no more than 10 people.
- The **team** should be very carefully selected, including **representatives** from: shifts, departments, lines, clerical, supervision, management including management, hourly and union.
- The **team** should include individuals who are:
 - natural leaders
 - generous contributors
 - creative enthusiastic
- The **team** should meet regularly with an action-oriented agenda.
- The **team** should have the authority to plan and execute the campaign.
- The **team** should function in sub-committees around activities that need to be done.
- The **team** should **"own"** the campaign on behalf of **all** employees.
- The team should create a campaign calendar for all employees to have access to, so they will know when campaign events will take place.

3.

Set a Challenging Goal:

_____ Together, with your CEO, establish an achievable employee campaign goal.

_____ Review your organization's previous history with United Way.

_____ Questions:

-How many employees gave last year?

-What was the per capita invest?

-What was the average invest?

-How many people gave through payroll deduction?

_____ Your campaign goal should reach toward higher achievement, both in terms of amounts given and the number of employees who participate. United Way staff will supply you with data to compare your giving to averages nationally, regionally, locally and within your own company.

_____ If 80% of the employees in a company gives one hour's pay per month, they will raise 100 percent of their "potential." (see sheet for figuring employee potential)

Best Practices

A company who had experienced low participation the previous year re-energized the campaign by kicking it off with an ice cream social and offering incentives throughout the campaign. The coordinator used pie wedges to illustrate past participation. CEO support was prominent and their endorsement of United Way was critical in focusing on employee participation by using the corporate matching invest.

Our Community Goal:

\$300,000

Our Community Potential

\$300,000 represents an important community commitment, however it is far from our potential.

The 2014 Island County Payroll*
is **\$967,002,080**.

.6 of 1% is equal to one hour's pay per month:
\$9,670,028

WORKFORCE

2014 average hourly pay \$18.23* x 12 = \$218.76

2014 average number of workers 27,890 x

80% employee participation rate = 22,312

22,312 workers x \$218.76 =

\$4,880,973.12 Community Potential

*Washington State Employment Security

Comparisons– 2011 Data Details:

In relation to population, Island County ranked 12th out of 25 United Ways of Washington.

In relation to 2011 \$ raised, Island County ranked 15th out of 25 United Ways of Washington.

In relation to per capita, Island County ranked 15th out of 25 United Ways of Washington.

Your Internal Campaign Goal:

Formula for Estimating Employee Potential:

1. Site Population _____ x (times) 80% participation _____
2. Average Hourly Rate \$18.23 x 12 = \$218.76
3. Line 1 x (times) Line 2 = **Full Potential** \$ _____

4. Amount Employees Contributed Last Year \$ _____
5. Line 3 - (minus) Line 4 (Growth Opportunities) \$ _____
6. 20 % of Growth Opportunities \$ _____
7. Target for 2016 Campaign (add Lines 4 & 6) = \$ _____

Suggested Challenge \$ _____

Best Practice

Many companies take the formula and apply it to a department or plant-by-plant basis to spark a little friendly competition among friends to help Island County be the best it can be!

4.

Make Giving Simple -Set up Payroll Deduction:

- Emphasize payroll deduction as a convenient, painless and generous way to give.
- Work with your payroll department to personalize pledge cards with employee's names and last year's invest amount, if possible.
- Implement campaign plan by..... Emphasizing **Year-round Services/Year-round Contribution**, by encouraging payroll deduction giving.
- It is easiest and employees can often give more generously than a specific amount at one time.

Reasons why You should give to United Way.....

- United Way sponsored services are available and accessible to everyone, in every part of Island County. Many of our residents take advantage of the services offered by programs funded through the United Way of Island County.
- United Way is run by volunteers. Concerned citizens like yourself are involved in fund-raising, budgeting, finance and community planning and serve on the board and committees of United Way of Island County and its funded agencies.
- United Way provides one coordinated campaign for all our partner agencies.
- United Way raises money at a very low cost since it is a volunteer organization.
- United Way is countywide, serving every town—and rural communities as well.
- It is easy to give through payroll deduction and your contribution is tax-deductible.
- You want to help make your community a better place to live—**so do we.**
- **You want to Live United.**

5.

Select your Solicitation Technique:

- Employees can be asked to contribute one at a time or in groups. Each method has advantages— only you can decide which will work best for you.

Two Types of Campaigns:

- Group Presentations
- One-on-One with solicitors
- **15-Minute Group Presentation:** Schedule employees into groups of 30 or less
- Group solicitation provides a more effective, less time consuming approach to asking donors for invests. Employees are given personalized pledge cards and are asked to make a contribution at the close of the campaign rally meeting.
- **Create a Climate for Giving during your meetings**
- **Use a United Way Speaker:** United Way speakers know, believe and live, the United Way. We can answer questions, give updates and share the case for giving.
- **Use Internal Employee Testimonials:** This is a wonderful way to convey How I LIVE UNITED.

****All of these elements are an important part of any employee campaign meeting. This is WHY people donate. "People Give to People". The key is educating them about the needs people have, and how they can help.**

- **One – On – One Solicitation:** Involves the personal solicitation of one employee by another peer. Solicitation should not be Supervisor-to-subordinate. This could involve implied coercion and should be avoided.
- Individual solicitation is best conducted immediately after a campaign meeting rally, when the spirit and awareness are high.
- Select one solicitor for every 5 contributors. This is not overwhelming and can be completed quickly.
- Select "natural leaders" who have respect from their peers and who are "believers" and / or are generous contributors to United Way.
- Allow adequate time – on company time – for each solicitor to contact the 5 prospects. (Solicit the "easiest" first)
- Set deadline for all pledge forms – contributors and non-contributors – to be returned to the Team.

Solicitation Examples:

15-Minute Group Presentation

Schedule all employees into groups of 30 or less, if possible.

<u>TIME</u>	<u>PROGRAM</u>	<u>BY WHOM</u>
2 minutes	Welcome Campaign endorsement Introduce Campaign Team	CEO or Coordinator
4 minutes	Hand out personalized pledge forms:	Team Members
5 minutes	United Way Presentation	Campaign Coordinator
4 minutes	<i>Ask</i> them to <i>please</i> give Collect pledge cards	Company Coordinator Team Members

15 minutes

****Note:** If 15 minutes is not possible, meeting times can be reduced; this is the best- case situation!

One – On – One Solicitation

- Select one solicitor for every 5 prospective contributors.
- Select “natural leaders” who have respect from their peers and who are “believers” and generous contributors.
- Arrange a “training program” (at least 1 ½ hours) for all solicitors. Include on-sight tours of supported programs, answer all questions and distribute 5 prospect pledge forms.
- Allow adequate time – on company time – for each solicitor to contact the 5 prospects. (Solicit the “easiest” first)
- Set deadline for all pledge forms – contributors and non-contributors – to be returned to the Team.

6.

Select and Train Solicitor /Volunteers:

- If you are a large organization, recruit people from each department and/ or employee groups. One solicitor for each employee group will be needed.
- If individual solicitation is used, you'll need one solicitor for every ten employees.

**Main goal of a campaign: EDUCATION
Educate employees on United Way, so they choose to invest.**

- The following are basic elements to be included in your volunteer solicitor training:
 - Endorsement of the United Way by the CEO and department leaders
 - United Way speaker and education of United Way using the video
 - Thank you for helping others!!!
- Your team should be well versed in the United Way Mission/ Verbiage and know why YOU should give to United Way.

The 2016 United Way Case for Giving is:

Welcome to United Way, where we understand the community's basic needs and address those needs in the most effective manner possible. United Way helps fund community services and each service addresses a vital need in our community.

A person in need may require assistance from many services to improve their life. By giving to the United Way, you ensure these broad range of services are available for everyone.

Funded programs are held to the highest standards of accountability. United Way helps bring people together to find solutions to community challenges. United Way focuses on removing barriers which keep people from being successful in life.

- Know the United Way Product and who it helps.



LIVE UNITED

Give. Advocate. Volunteer

United

United Way of Island County 8 Member Agencies, 4 Sponsored Programs, and 16 Donor Designations in 2015:

United Way of Island County Partner Agencies

Big Brothers/Big Sisters of Island County
Citizens Against Domestic and Sexual Abuse
(CADA)
Community Resources Foundation
North Whidbey Help House
Opportunity Council
Senior Services of Island County
South Whidbey Children Center
Toddler Learning Center

United Way of Island County Sponsored Programs

2-1-1 (United Way)
Early Learning (United Way)
Family Resource Guide (United Way and Whid-
bey News-Times)
Volunteer Solutions (United Way)

Community Events

Day of Caring: Projects with Toddler Learning
Center
Instant Wine Cellar: September 30, 2016
National Night Out: August 1, 2016
Children's Day (Planning Committee)
– September 24, 2016

United Way of Island County Executive Director Membership In

Partners in Young Children
Island County Homeless Housing Board
Navy League
Oak Harbor Chamber of Commerce
Oak Harbor Youth Coalition
Soroptimist International of Coupeville

Donor Designations in 2015 in Island County

American Red Cross, Island Chapter
CADA
Evergreen Freedom Foundation
Girl Scouts of Western WA
Goosefoot Community Fund
North Whidbey Help House
Oak Harbor Education Foundation
Oak Harbor Senior Center
Opportunity Council
Planned Parenthood (Great Northwest)
Ryan's House for Youth
Senior Services of Island County
Spin Café
Toddler Learning Center
WAIF
WEA Children's Fund

United Way of Island County 2015 Community Investments Made by Corporate and Employee Groups

3M Retirees
ADP
Amazon Smile Foundation
American Airlines
AT&T
Banner Bank
Boeing Company
Boeing Employee Community Fund (ECF)
Boeing Retirees
Cambia Health
Cigna
City of Oak Harbor Employees
Comcast Employees
Comcast Foundation
Compass Health
Costco
Coupeville School District
Eaton Corporation
Enterprise Holdings
Fed Ex
Forest City
Enterprises
GE Foundation
Heritage Bank
Hoffman
Construction
Island County Employees
Island County Housing Authority
Jewish Federation of Greater Seattle
Kellogg's

KeyBank
Law Office of Skinner
Liberty Mutual
Macy's East
Microsoft
Nordstrom
Oak Harbor School District
O'Reilly Auto Parts
Peoples Bank
Puget Sound Energy Employees
Puget Sound Energy Foundation
Seattle Goodwill Employees
Shell Oil
Snohomish CECC
Snohomish PUD
Sno-Isle Regional Library
The Korte Company OOA
Truist-Click n Give
Toddler Learning Center
UPS
US Bank Foundation
Wal-Mart
Washington Federal
Washington State CFD
Wells Fargo Bank
WhidbeyHealth

IN-KIND DONATIONS:

Boeing Corporation
Whidbey Island Bank
Whidbey News-Times

I don't like "x" agency, why should I give?

Although you may not like a certain agency, you can be sure it's providing a valuable service to the area or it would not be funded by the United Way. All of the organizations receiving United Way funding do not have equal appeal to everyone. Each one, however, is an essential part of the total human services necessary to our community. There are hundreds of people looking to these agencies for help and guidance. United Way funding is based on the service of the agency and the need for that service, not agency popularity. In addition, with our donor designation policy, you can write on your pledge card the name of the partner agency you would like your money to go.

Who determines how much each agency receives?

The United Way has a Community Investment Team consisting of board members and volunteers who carefully review each request for funding. Each year, the agencies' finances, programs and more are examined by the United Way. Funding decisions are based on all factors, plus site visits and personal interviews.

I've got a complaint: Someone I know didn't receive help from a United Way agency.

Get the facts...names, dates, all the pertinent information, and then call the United Way of Island County. All complaints will be checked out thoroughly. No one who needs help is ever deliberately turned down. Over the years, we have found through careful investigation, that many complaints are usually misunderstandings that can be resolved. Occasionally, however, there are cases where an agency has been allocated only enough funds to assist a specific number and the budget simply cannot be stretched any further.

Are the campaign workers paid?

No. From the Campaign chairperson to volunteer solicitors, no one receives any pay. In addition to giving their time, talents and contributions, they pay all expenses incurred in working on the campaign. There are only 2 full time paid staff members who work at the United Way office.

Why should I give, I never use any agency services?

Are you sure you don't? You might be surprised. Are your parents/grandparents part of the Senior Services of Island County? Are you children in daycare? There are many services that you may already use and not be aware that they have received funding from United Way.

Even if you don't use the services, the health, happiness and well-being of everyone in it directly influence the wholesome atmosphere of a community. Delinquency, abuse, neglect of the needy and handicapped, and drug abuse—these all imperil everyone in the community. Illness, family problems and other such things know no economic boundaries. You or members of your family may not need United Way services now, but you may in the future. It is comforting to know that if you should ever need them, they will be available. In the meantime, an investment to United Way is clear expression of concern for your neighbors.

What if I can't afford to give?

The reality is, "Can we afford not to give?" The needs of people are not going to be ignored. It boils down to a choice; freedom of choice of doing it ourselves, voluntarily through local decision-making, or less effectively and at greater cost, through non-voluntary, compulsory ways.

**Thank you for your time and dedication to
Your United Way!!!**

Frequently Asked Questions

Answers to often asked questions and common concerns

What is the United Way Campaign?

It is the fundraising arm of United Way of Island County, an organization operated by a volunteer group of local citizens.

The object of the United Way campaign is to eliminate the effort and cost of many separate campaigns. It does this by conducting a single, annual campaign for the financial needs of the health, social services, youth and rehabilitation agencies that apply for funding from United Way of Island County.

United Way assures the contributor that maximum value is received for each contributed dollar and that member agencies maintain a high degree of efficiency and quality of service.

What are the advantages of United Way?

- Saves money wasted in having separate campaigns;
- Reduces annoyance of separate campaigns;
- Meets the most serious community needs first;
- Encourages high standards of agency service;
- Frees agency personnel to devote their time to helping people, with minimal time out for fund raising;
- Is the most economical, efficient approach to community fundraising yet devised;
- Invests funds for services according to need, not popularity;
- Conserves the energy of volunteers; and
- Assures contributors that their contributions will be used effectively and they are doing what their contributor intended them to do.

Who may belong to United Way?

Any bona fide health or human service agency may apply for funding. It should have a worthwhile program that meets a community need that is not already being met by another agency. It must also agree to present its finances, budget, audit and program to United Way's volunteer agency review panel.

United Way dollars go as handouts to deadbeats who refuse to help themselves.

Not true. One of the advantages of giving to United Way is the assurance to you, the giver, that these United Way dollars are budgeted to agencies that serve the people with the greatest need. Volunteers, many of them your neighbors do this budgeting, so you can know that the dollars are helping the right people.

If I stop working, what happens to my pledge?

Your pledge to United Way is made in good faith and is based upon your earnings. Should you cease to be employed, you are completely and immediately absolved of your pledge for that period.

Handling Objections

You can expect at least some of the people you solicit to object to the idea of giving to United Way, especially when you ask them to increase their pledge this year. Objections are a natural part of the campaigning process, so they should be regarded as welcome signals that you are doing the job the way it should be done.

However, unless you really understand what objections are and how to handle them, they can present big problems. Therefore, the purpose of this section is to give you some practical insight into the psychology of objections, and a simple system for handling them.

Keep the following points in mind:

Objections are not personal – An objection is never directed against you. It is directed at the idea you are presenting.

Objections are probably not real – Most objections are “stalls rather than sincere objections.” You have to probe pretty deep to uncover the real thing.

Be sympathetic – Listen carefully to what your prospect says and sympathize. You don’t have to agree—you can be sympathetic and listen without agreeing. In short, reflect the objection.

You handle the objection – The operative work is handle, not answer. You can’t answer an objection because it is almost always more imagined than real. Obviously, you can’t logically answer an imaginary argument; you must handle it, go around it, and deflect it.

Don’t argue with your prospect – If you argue with an objection, you will force your prospect into defending it, which will be resented. Always keep in mind the old adage about winning the battle but losing the war. Your goal is not to win an argument, but to win a pledge.

Encourage the contributor to talk – When an objection is voiced, let the prospect expound on it at length. If the objection is insincere, illogical or both, it will tend to fall on its own weight as it is articulated.

Above all, relax and be yourself – You shouldn’t feel that your job is to match wits or verbally “fence” with your prospect. Neither is it necessary to overwhelm your prospect with rhetoric. You have an important idea to present and you should be absolutely straightforward in doing so. Remember that the solicitation isn’t a “win-lose” situation, it is a “win-win” one.

Reflect statements: “I can appreciate that” “That’s a normal reaction” “That’s interesting” “I’m not surprised to hear you say that”. In each case, the reflect statement should be followed by a question. This question should be framed as follows: “Why do you feel (repeat the objection as the prospect stated it.)?”

ABOVE ALL..... if in doubt, refer back to the United Way...someone will contact them and get you off the hook.

Fundraising in Difficult Times

Understanding Giving Psychology Before someone decides to give they go through the following process: Awareness, comprehension, conviction, desire, and action. The advertising pyramid below depicts the five components (original source: www.highered.mcgraw-hill.com).

Share the cause (awareness) - Tell co-workers about the United Way annual campaign. Acquaint people with United Way's mission and needs.

Know the cause (comprehension) – If you understand how United Way works and the services provided, you can share your commitment to supporting the United Way more clearly and easily. Knowing the cause, really knowing, enables you to educate co-workers about how the United Way impacts the community in a unique way. You need to know who is receiving services—which of your friends, neighbors, co-coworkers have benefited from United Way. Ask everyone if they've ever used a United Way services. Ways to get the message out:

Believe in the cause (conviction) - People know when you're just going through the motions. They also know when you truly believe in what you are doing—your passion shows.

Commit to the cause (desire) - And when others feel your passion, they share your desire to help.

Ask for the cause (action) - Ask for the donation—many people have a desire to give but no one asks. Achieve action by getting the pledge or contribution.

Responses to "I can't afford to give":

- 1) Those of us who have jobs are more fortunate than those who, through no fault of their own, are unemployed and struggling to take care of their families. We need to Live United.
- 2) If we had a layoff wouldn't you want United Way to be there for you? We need your contribution to keep United Way going.
- 3) A invest of \$5 a week will probably not make a significant difference in your lifestyle, but it WILL make a difference in the life of someone less fortunate. For example, \$5 could provide a day's worth of food for a family of four who otherwise wouldn't eat.
- 4) In difficult times the need is greater: Island County residents have already begun to seek help from member agencies for the first time: food pantry requests are increasing, hard-working families are asking for help.

Advertising Pyramid



7.

Planning:

**Planning your campaign!!!
Plan Long and Run FAST!!!!**

YOUR Campaign Planning Guide:

**STEP 1 – Analyze
STEP 2— Follow the Campaign Timetable
STEP 3— Implement your plans!**

STEP 1 – Analyze Last Year's Campaign:

- Why did your employee giving **per capita** increase/decrease? _____
- What was **best** about your employee campaign last year? _____
- What was the **weakest** part of past campaign? _____
- What is a good **summary statement** of your last 5 employee campaigns?

- What was the **cause** of this reality? _____

Leadership:

- Did the CEO in your firm play a positive, "**Leadership by Example**" role in the planning and execution of your employee campaign? _____
- Did the Coordinator provide a **dynamic, creative and positive** leadership role?
_____ Comments: _____
- Was a **representative committee** of employees established to plan and execute the campaign? _____
- Comments: _____

Giving:

- Was a positive "**climate for giving**" created? _____
- What **percentage** of employees **contributed** last year? _____%
- What **percentage** contributed "**one hours pay per month**"? _____%
- What **percentage** of employees did **payroll deductions**? _____%

Planning:

**Planning your campaign!!!
Plan Long and Run FAST!!!!**

Organization:

- Was there a **timetable** for last year's campaign? _____
- Was it followed? _____
- Did you "**plan long and run fast**"? _____

The Plan:

- Was there an actual "**plan**" for the campaign? _____
- Was it followed? _____ Comments: _____
- What were the **fun** elements of the plan and the campaign? _____
- What were the **educational** elements of the plan and the campaign? _____
- What were the **incentives** in the plan and the campaign? _____

- Is there something you would like to change this year to make it better?

Thank You Program:

- Was there a comprehensive "**thank you**" program? _____
List the ways people were thanked: _____



2016 Campaign Planning Checklist

Date	Action	Completion
<input type="checkbox"/>	1. Review United Way Campaign Coordinator Guide	_____
<input type="checkbox"/>	2. Obtain top executive's endorsement and support	_____
<input type="checkbox"/>	3. Set employee goal	_____
<input type="checkbox"/>	4. Develop campaign plan	_____
	Timetable	_____
	Materials	_____
	Kick-off	_____
	Incentives	_____
	Additional campaign elements	_____
	CEO plan approval	_____
<input type="checkbox"/>	5. Recruit campaigners	_____
<input type="checkbox"/>	6. Complete campaign kits with personalized pledge forms	_____
<input type="checkbox"/>	7. Train campaigners	_____
<input type="checkbox"/>	8. Ask United Way to schedule speakers	_____
<input type="checkbox"/>	9. Publicize the campaign with articles, photos, and invite the press to company campaign events	_____
<input type="checkbox"/>	10. Schedule employee group meetings	_____
<input type="checkbox"/>	11. Send top executive endorsement letter to all employees	_____
<input type="checkbox"/>	12. Conduct employee group meetings	_____
<input type="checkbox"/>	13. Report progress to Top Executive	_____
<input type="checkbox"/>	14. Submit final report to United Way	_____
<input type="checkbox"/>	15. Thank campaigners with events, posters, notes etc.	_____
<input type="checkbox"/>	16. Attend the United Way Campaign Celebration!!!	_____

7.

Planning: Use Resources to Publicize the Campaign:

- Incorporate all United Way supplies and resources into your campaign plan!
- United Way has campaign materials for you to use! Order them early!
- Find things which do not cost money to use in your campaign: prime parking spots!!! (See idea sheet)
- Educate all employees by using company newsletters, memos, intercom morning announcements, posters, bulletin board letters, goal thermometers, videos and payroll stuffers.
- Be creative on how your employees find out about the campaign!
- In your newsletter/ employee communications, print a question and answer column, United Way trivia game, United Way progress reports/charts/statistics
- Announce all campaign events well in advance
- Track your company's progress on a thermometer displayed on a bulletin board
- Take every opportunity to emphasize how United Way benefits the community
- **HAVE FUN!!!!!!!!!!!!!!!!!!!!!!**

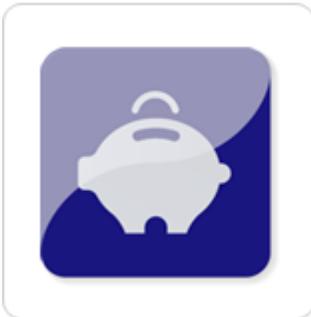
26 Ways to Live United...and Counting

Education



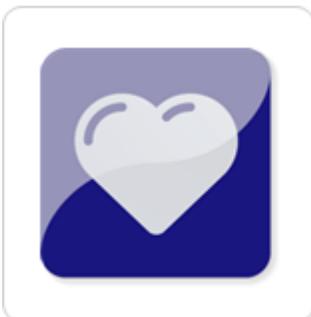
1. Invite a friend, neighbor, family member to attend a school board meeting with you.
2. Organize a book drive with your family, co-workers, school, club or faith community
3. Read to children in your family, at your library, or with a local non-profit engaged in child care or literacy.
4. Purchase school supplies for a local school to distribute to children who need them.
5. Enroll your child in a summer reading program at the local library.
6. Donate your newspaper subscription to a local school when you go on vacation.
7. Allow a high school student to shadow you at work and show them how apply things you learned in school.
8. Take the children in your life to a local museum, exhibit or play.
9. Be a mealtime partner for a pre-school class to help kids develop social skills.
10. Mentor an at-risk youth at your neighborhood school.

Income



11. Bring a child in your life to a bank to have a tour and open up a savings account.
12. Tutor at an adult literacy or technology program
13. Donate new or gently used professional clothing to an organization assisting individuals in seeking employment.
14. Serve as a greeter at a free tax preparation community coalition site to help low-income families acquire up to thousands of dollars in earned income tax credits.
15. Volunteer to prepare tax returns for low-income families.
16. Contact your local representative about and issue affecting working people in your community.
17. Ask your bank if they offer free checking and savings accounts to low-income families and encourage them to start if they don't.
18. Engage with a middle school to teach a class on how to save money and watch with them as it grows.
19. Help senior citizens learn how to detect and prevent fraud.

Health



20. Contact your local health clinic to offer assistance in anything from distributing flyers to serving on an event committee to writing a letter to the editor on their behalf.
21. Check into what healthy snacks are or are not available in your local schools and call on others to promote tasty healthy meals and fun exercise at school.
22. Start a walking group for friends, families, neighbors and/or community members that meets regularly at a set time and location. Soon the group will exist even if you can't make it!
23. Get a flu shot.
24. Buy pedometers for your friends and have a fun competition for who can walk the most steps.
25. Purchase personal care items such as deodorant, toothbrushes and soap and drop them off at the local homeless shelter.
26. Help transport families to necessary medical appointments so children can have proper screening and immunizations.

HAVE FUN! FUN-draising!!

Publicizing Your Employee Campaign:

BOSSSES CAN HELP BOOST YOUR BUCKS

ADMINISTRATORS FOR SALE

Employees purchase raffle tickets to win an administrator for the day. The administrator agrees to work for the winning employee or department that raises the most.

ARREST THE BOSS

See how much money co-workers can raise to get the boss “out of jail” or keep the boss “in jail!”

CAMPIN COMMANDERS

For \$1 a vote, pick your favorite administrator to “camp out” on the front lawn of your business to toast marshmallows for s’mores to passersby. You can also sell the s’mores for United Way.

DUNKING BOOTH

Pay said amount of money for three chances to dunk the boss or other favorite targets in the company.

GO HOME EARLY

The boss collects a set amount of money at the front door from every employee who wants to leave work early that day.

EXECUTIVE TAXI SERVICE

Co-workers pay to guess which executive will win the race.

KISS THE PIG

Managers and supervisors are given funny names, (i.e. Ham Bone Jeff, John Chittlin, Bacon Bill, Suee-ieee Sue, Tammy Tenderloin) and employees can donate a dollar to vote for their favorite. Updates are given by intercom at least daily or whenever a big turnover in total has occurred. On the last day of the contest, the “winner” kisses a pig at a planned time and place.

POWER LUNCH

Pay said amount of money to have lunch with an executive.

HAVE FUN! FUN-draising!!

Publicizing Your Employee Campaign:

THEMES

BEACH BLAST THEME

Employees come dressed in Hawaiian print shirts. Bosses can be dressed in grass skirts and have a beauty contest with the voting counted by the most quarters only donations into the coin jar. You can sabotage the other contestants by putting in dollar bills which takes away from the quarter donations.

WILD WEST THEME

This works well as a kick-off event. Employees dress in western clothes and tacos are served with donations going to United Way from the sale of the food. Use a cactus as your goal thermometer.

When to Use Incentives

- For payroll deduction invests
- For individual department % increase in giving
- For departments completing their campaign first
- For turning in pledge cards
- For new invests
- For attending a department presentation or event
- For being a leadership giver

STOCKING STUFFER GRAB BAG

Charge a set amount for employees to grab a company trade item from a stocking or bag.

VALENTINE'S DAY – Sell homemade candy, suckers, brownies, cookies or anything chocolate.

HAVE FUN! FUN-draising!!

Adorable Baby- Post pictures of employees' children or grandchildren. Co-workers must pay a set amount per vote for the most adorable child. Ballot box stuffing is encouraged!

Pet Photo- Employees post a picture of their pet(s) on the bulletin board. Co-workers pay a set amount per vote for the cutest pet, most unusual pet, ugliest pet and funniest pet. Award all winning pet owners a prize for their pets such as cat food, dog bones, etc.

Putting Green-Construct a putting green in your lobby and charge a fee for employees and/or customers to putt for prizes.

Beat the Bad Habit- Get co-workers to stop being tardy to meetings, popping their gum, failing to recycle, leaving letterhead in the copy machine, whatever! Offenders pay a quarter for their transgressions!

Drawings/Raffles- Secure a donated prize such as a weekend stay at a local resort, movie passes, concert tickets, professional/college sports games, museum passes, etc. Sell tickets and draw the winning ticket at a designated time and place. This can also be done in half- &-half fashion where half the proceeds are given away as the prize. The other half of the proceeds benefit United Way.

Jellybean Counting—For a donation, co-workers can guess how many jelly beans are in that jar. This can also be done with M&M's, Skittles, Lifesavers, etc.

Miles of Quarters—The goal of 1/4 mile is 15,840 quarters or \$4,000. You have 12 inch rulers done up with the goal and names on it. You solicit employees and pre-sale the rulers. \$3 equals one foot of quarters. \$9 equals 1 yard. You can do this in your parking lot or on the street (get City approval) marking 1/4 mile along the curbs. When pre-sold, you chalk the person's name and length they bought.

Pimp Your Peeps-"Pimp Your Peeps" contest. Each department can decorate Peeps. Bunny Peeps with hair, glasses, stethoscopes or chorus line of Peeps with pipe cleaner legs and feathers. They are put on display and employees and visitors vote with a donation for their favorite.

Unlock a Chest of Treasures-Encourage co-workers to buy a key for a set amount. One key will open a treasure chest of prizes.

Who's the Baby-Ask co-workers to bring in their baby picture. Each week feature a new group of pictures on the bulletin board. Employees then purchase chances to guess which baby picture belongs to whom.

HAVE FUN! FUN-draising!!

Publicizing Your Employee Campaign:

- Send messages on E-mail or in-house computer systems and use Trivia questions from U.W. –the closest to the correct answer wins.... Something.
- Publish articles in the employee newsletter. Pictures of people with the United Way logo.
- Post information on company bulletin boards, weekly e-mails and daily announcements.
- Publish a calendar of campaign events.
- Hang United Way posters, banners or thermometers in heavy traffic areas.
- Place fun, creative door hangers on office doorknobs. Have a contest for most creative use of the campaign theme.
- Decorate the break-room, stairwells, and inside of restroom stall doors with the campaign theme.
- Ask department heads to talk about the campaign at monthly staff or safety meetings.
- Ask program recipients to tell of their experiences.
- Have an executive staff person walk through the work place wearing a sandwich board advertising the campaign.
- Departments dress for the theme of the campaign for a day and reward the best-dressed.
- Have a prize for the most theme-decorated desk/area on campaign day.
- Have a contest on who could write the best United Way jingle for the Campaign. The winner (s) will have center stage at the campaign celebration to sing their entry!!!
- Have a “What would you do for United Way” day (ie: “What would you do for a Klondyke Bar?”) Have people do funny things, take digital pictures of them and post them on an employee bulletin board...(Give them a reward, by all means!!) Chocolate is usually good!
- Incentives for employees who contribute one hours pay per month: (“Champions Club”)- they will be invited to a “Breakfast of Champions”

If 80% participation happens, treat to a grand prize for ALL employees such as a dinner/picnic for everyone! Big party~!

Questions for Company Press Article:

Company: _____ Who is your
Coordinator? _____ # _____
E-mail: _____

1. What is the motto of your Company? _____
2. How long has your company been in business? _____
3. What is interesting or new about your company? _____
4. What is your company known for? _____
 - How many employees do you have? _____
 - Branches? _____ Counties? _____
5. How does your company 'give-back' to the community? _____

6. What made you decide to become a United Way participating company this year?

7. When is your campaign? _____
8. What is YOUR theme for your Campaign?

9. What are you doing to promote the theme? (decorations, special days etc.)

10. What are some of the incentives for giving you have planned?

11. What are you doing to incorporate Fun into the campaign? _____

12. What are you doing to incorporate education of United Way in to the campaign?

13. What is your company goal? \$ _____
14. If \$ goal is reached what is the reward? _____
15. Is the CEO doing anything 'special' to promote United Way? _____
16. If so, what? _____
17. Is there a corporate invest? _____ Matching employees \$? _____
18. Are you having employee meetings? _____
19. Are you going to use the United Way video? _____ 20. What
other things is your company doing for your United Way campaign?

Please return to the United Way office.
Thank you for your time!!!!

8.

Implement your campaign:

Run FAST!!!!

- You've planned your work..... Now it's time to work your plan!!
- Have a one-day, United Way blitz!!!!

(*Don't forget to give pledge cards to those who were absent from the meeting!)

- All successful campaigns include certain basic elements:

Remember to:

- A. Personalize all employee pledge cards
- B. Promote the use of payroll deduction.
- C. Conduct a short, intensive campaign to keep enthusiasm high.
- D. Create a climate for giving
- E. Have Fun!!!! Raffles, contests, drawings.....etc)
Make you campaign different, exciting and successful.

Make "The Ask"

**People sometimes do not give,
because they have not been asked.**

- **Ask for the pledge by.....**
Ensuring everyone was asked to give in a personal, face-to-face meeting
****People Give to People:**
- It's a fact that people give to people as frequently as they give to causes.
Therefore, assure that those doing the "ask" are natural leaders among their peers.
- Request pledge cards while enthusiasm is high
- Complete pledge form at meeting and turn in by the end of the meeting.

9.

Follow Through, Report Results and Say THANK YOU!!!

Report campaign results by.....

- Notifying United Way of the company's progress
- Advising your CEO and committee of the company's progress
- Posting and updating progress charts
- Take the campaign packet to the United Way with all donations collected!

Thank you!!!!!!

Thank the employees by.....

- Sending a CEO thank you letter to all employees
- Event/party/dinner hosted by plant manager appropriate to the employees' giving
- Event should set the stage for next year
- ****Say thank you 7 times:**

Everyone likes to receive recognition for a generous gesture, their time and or their talents!

Publishing thank-you messages in the employee newsletter, clipping and posting them on the bulletin board

Displaying campaign photos and memorabilia



And the LAST thing you HAVE to do is....

Attend the United Way campaign celebration in February and Celebrate!