

2011



Lubbock Area United Way

Campaign C o o r d i n a t o r G u i d e



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LIVE UNITED

Quick Reference

Below is a list of important dates:

Campaign Kick-Off

August 25, 2011
11:45 am - 1:00 pm
Lubbock Memorial Civic Center

Campaign Coordinator Rally

August 30, 2011
3:30 - 5:00 pm
Lubbock ISD
Joy Gordon Room
1628 - 19th Street

Mid-Campaign Report

October 13, 2011
11:45 am - 1:00 pm
Lubbock Memorial Civic Center

Victory Report

November 29, 2011
11:45 am - 1:00 pm
Lubbock Memorial Civic Center

For Reservations call the United Way office, **806.747.2711**

Loaned Executive name and contact information:

From the Campaign Chair

Dear Campaign Coordinator:

Thank you for serving as a Campaign Coordinator for the United Way campaign. Each year more than 250 coordinators like you do some of the most valuable work of the campaign.

Over 70% of the funds raised each year comes from employees all over the Lubbock area. These funds stay here and make a real difference for people in need every day.



Kevin McMahon

Campaign Coordinators are some of the most important volunteers and much of the success of the campaign comes from people like you. This guide is a wonderful resource, along with our campaign volunteers and the United Way staff.

As the 2011 Campaign Chairman, I have had the opportunity to visit all of the community partners. I have been very impressed to see our donor's dollars at work. I am touched by the dedication and passion of the community partners' staff. Some of the needs they meet in our community are hard to talk about, but it is so good to know that quality help is available from caring professionals who have dedicated their lives to service.

In the West Texas area, we know how to be good neighbors. We are willing to step in when someone needs a hand. Volunteers are the lifeblood of United Way. Their dedication to our mission empowers them to ask others to give. They ask so that people in need have a place to go, someone to count on and the help they really need.

Thanks for being a good neighbor and lending a hand during the United Way campaign. Your efforts matter and do make a difference.

Best Regards,

A handwritten signature in black ink, appearing to read "Kevin McMahon".

Kevin McMahon
2011 Campaign Chairman

Your Role....

Thank you for being your company's Campaign Coordinator.

Each year, volunteers like you play an important role in the Lubbock Area United Way Annual Campaign.

What does a Campaign Coordinator do?

As a coordinator, you help your co-workers get involved in making our community a better place by planning and coordinating a successful United Way campaign within your company. Below is a short list of key responsibilities and guidelines.

Key Responsibilities and Guidelines:

- Attend the United Way Campaign Coordinator Training: August 30th LISD - Jay Gordon Room
- Meet with CEO to discuss your workplace campaign
- Recruit a team of volunteers to assist you
- Set an example by making the first pledge
- Develop a plan for your company campaign, include dates and goals
- Coordinate collection of campaign materials needed for your organization
- Request speakers and agency tours from United Way
- Promote the campaign throughout your company
- Educate your co-workers about Lubbock Area United Way
- Attend United Way Campaign events and invite your co-workers
- Complete your final report and send it with pledges to United Way
- Thank your donors and volunteers
- Evaluate and make recommendations for next year

About your United Way

Lubbock Area United Way and our supporters work to create lasting, positive change in our community.

Key to this work are the 23 Community Partner Agencies and the Education Matters Initiative.

The Education Matters Initiative is:

United Way

SUCCESS BY 6

Healthy Start, Ready for School

Working to make sure babies are born healthy and children are ready to enter kindergarten healthy and ready to learn.

United Way

SUCCESS
in school



Stay on Track, Finish on Track

Connecting young people with the resources they need to graduate from high school and move on to a bright future.

United Way
SUCCESS
for life



Literacy and Job Skills

Creating opportunities for adults to gain the literacy and job skills they need to work and live independently.

Some Quick Facts:

- Our mission statement is: Giving • People • Hope
- The money raised in Lubbock stays in the area. Our organization sends less than 1% of the total amount raised to United Way Worldwide as our membership fee. This fee provides us with national fundraising opportunities, marketing and staff training support.
- The Better Business Bureau recommends that charitable organizations spend no more than 35% on fundraising. The Lubbock Area United Way's fundraising and administration expenses average 14%. This percentage is far below the 35% recommended by the Better Business Bureau's Standards of Charity Accountability.

Our Community Partners

2011 Lubbock Area United Way Community Partners:

- American Red Cross South Plains Regional Chapter
- Big Brothers/Big Sisters of Lubbock
- Boy Scouts – South Plains Council
- Boys & Girls Clubs of Lubbock
- CASA of the South Plains (Court Appointed Special Advocates)
- Catholic Family Service
- Children’s Advocacy Center of the South Plains
- Communities In Schools
- Early Learning Centers of Lubbock
- Family Counseling Services
- Girl Scouts Texas Oklahoma Plains, Inc.
- Goodwill Industries of Lubbock
- Guadalupe-Parkway Sommerville Neighborhood Centers
- Legal Aid Society
- Literacy Lubbock
- Lubbock Children’s Health Clinic
- Lubbock Rape Crisis Center
- Lutheran Social Services of the South
- The Parenting Cottage
- The Salvation Army
- Volunteer Center of Lubbock
- Women’s Protective Services
- YWCA



Campaign Checklist

GIVE. ADVOCATE. VOLUNTEER.

Getting Started: What to do before your campaign

- Your Loaned Executive will contact you and bring you the necessary campaign materials. He or she will also help with your campaign planning and answer any questions you may have.
- Attend the United Way Campaign Coordinator Training: August 30th LIRD - Jay Gordon Room
- Decide on the company campaign goal. Encourage your organization to make a corporate donation in addition to the employee campaign.
- Choose a time frame for your campaign. Typically, a two week campaign works best for most organizations. Don't forget to schedule a speaker(s) from our Speakers' Bureau to come to any and all employee campaign meetings.
- Plan a kick off event for your campaign and send an invitation to all of your company's employees at least one week before the event.

On a roll: What to do during your campaign

- Host your kick-off event.
- Be creative with your kick-off. Look for ideas on page 12.
- Include United Way facts and information in your company's newsletter or other types of communications.
- Put up United Way posters as a visual reminder to your co-workers of their campaign progress.

Finishing it up: What to do after your campaign

- Complete and return the final report form to your Loaned Executive.
- Share your campaign results with your entire organization.
- Evaluate your company's campaign and communicate any recommendations to your Loaned Executive.
- Thank all of your volunteers and contributors.

Campaign Tool Kit

We want you to have all the tools you need to enjoy a successful campaign. Here is a list of all materials and resources available to you:

PRINTED MATERIALS

Pledge forms- How to fill it out in 3 easy steps

The form is titled "LIVE UNITED" and "UNITED WAY PLEDGE FORM". It is for the Lubbock Area United Way. The form is divided into three main sections:

- 1. Fill in the contact information at the top**: This section includes fields for "FIRST NAME", "LAST NAME", "EMPLOYER NAME", "E-MAIL ADDRESS", "HOME ADDRESS", "CITY", "STATE", "ZIP", "HOME PHONE", and "DAYTIME PHONE". There are checkboxes for "I would like more information on the Lubbock Area United Way Statement." and "Want to see how your contribution is making a difference? Check here if you would like to receive our e-newsletter. Include your e-mail address in the line to the left."
- 2. Choose how you want to give**: This section is titled "Total Gift: \$ _____" and "Select one of the four giving options below: Easy Payroll Deduction, Direct Bill, Bank Draft or Give Now". It includes sub-sections for:
 - EASY PAYROLL DEDUCTION**: Options for \$50, \$15, or \$5 each pay period, or a percentage of annual salary.
 - DIRECT BILL (\$500 minimum)**: Options for Monthly or Quarterly billing.
 - BANK DRAFT (Please attach a voided check!)**: Fields for Bank Name, Account Number, and Routing Number.
 - GIVE NOW**: Options for Cash, Check, or Credit/Debit Card.
- 3. SIGNATURE TO AUTHORIZE PLEDGE (required)**: A section for "SIGNATURE" and "DATE".

At the bottom, there are checkboxes for "I do total annual gift of \$1,000 or more qualifies me for membership in the Lubbock Area United Way Leadership Giving Circle..." and "Register me for the Local Contributors Program...". There is also a "Special Instructions" section with lines for additional notes.

1. Fill in the contact information at the top
2. Choose how you want to give
3. Sign your name

White copy- United Way's copy
 Yellow copy- Your organization's copy
 Pink copy- The donor's copy

The bottom of the pledge form is optional. This is where donors can identify themselves as leadership givers or as loyal contributors.

The designated contribution section allows donors to designate their donation. The donor can designate to a maximum of two Lubbock Area United Way Community Partner Agencies or two neighboring United Ways. There is a minimum of \$50 for each selection.

Undesignated gifts are automatically allocated to the Community Fund.

A list of the 23 Community Partners is found on back of form.

Campaign Tool Kit- *continued*

Report forms- Guidelines for completing your Report form

OPEN YOUR HEART. LEND YOUR MUSCLE. FIND YOUR VOICE.
LIVE UNITED.

United Way
Lubbock Area United Way

Company/Organization Name _____ FOR OFFICE USE ONLY:
Address _____ Data Entry Session No. _____
City/State/Zip Code _____ Envelope No. _____

Lubbock Area United Way
1655 Main Street, Suite 404
Lubbock, TX 79401
tel 806.243.2711 fax 806.243.2746
www.liveunitedlubbock.org

COMPANY UPDATE

Total Number of Employees (Givers and Non-Givers)

Billing Address _____ Human Resources Contact _____
Contact Telephone Number _____

Billing Cycle Monthly Quarterly

Month of First Bill _____ CEO Name _____

SUMMARY REPORT

This report is: (please choose one) Partial Final

PLEASE INCLUDE ONLY ATTACHED PLEDGES AND PAYMENTS

Employee Gifts	No. of Givers	Amount of Gifts	Amount of Cash/Checks	Balance Due
Payroll Deduction Enclose company and donor copy of pledge forms (Enclose United Way white copy)		\$	\$	\$
Fully Paid Pledges Enclose United Way white copy of pledge forms, cash and checks		\$	\$	\$
Direct Billing Enclose United Way white copy of pledge forms		\$	\$	\$
Bank Drafts Enclose United Way white copy of pledge forms		\$	\$	\$
Credit Cards Enclose United Way white copy of pledge forms		\$	\$	\$
Employee Gift Total Sum of lines above		\$	\$	\$

SPECIAL EVENT FUNDRAISER (if applicable)

Amount Raised Amount Enclosed

Type of Fundraiser (i.e., raffle tickets, bake sale, etc.) _____ Special Event Coordinator _____

SIGNATURES

Company Coordinator _____ Date _____
United Way Volunteer _____ Date _____
Received By _____ Date _____

- Record all donations and provide totals
- Remember to include the contact person at your organization that handles payroll deduction pledges

White copy- United Way's copy
Yellow copy- Your organization's copy
Pink copy- The donor's copy

- The yellow copies of payroll deduction forms are retained by your organization

- Checks should be made payable to Lubbock Area United Way
- Drop off the report form at the Lubbock Area United Way office or contact your Loaned Executive to schedule a pick-up

MORE PRINTED MATERIALS

Campaign posters

These are double sided. On one side, you can track your organization's campaign progress. The other side carries a thank you message.

New hire brochures

These brochures are a good tool to educate newly hired co-workers, and include an easy way for them to give.

ON-LINE RESOURCES

Web site- www.liveunitedlubbock.org

The United Way web site is a great source of in-depth, up-to-date information. It includes current news, financial information, and updates on our work. Also, campaign materials can be printed directly from the site.

E-news

While on the web site, visitors can sign up at the top of any web page to receive our electronic news. It's a great way to keep informed on how United Way is working in the community throughout the year.

A Story of One

These personal stories are sent out electronically eight times per year. They include stories from volunteers, staff and other individuals who have been impacted by United Way or a United Way Community Partner.

Lubbock Area United Way general brochure

There are two versions of this general information brochure. We can send you a formatted e-mail that you can e-mail out to your entire company, or we can e-mail you a document that you can print as needed.

Don't forget these!

The United Way Campaign video

DVD and VHS copies are available. Plus, the video is available electronically.

Speakers' Bureau

Volunteer speakers are available to attend your workplace campaign meetings to talk about the personal impact of United Way. These trained volunteers include Community Partner staff, community volunteers and people who have been served by a United Way Community Partner agency.

Schedule by calling Lynn Owens at 747-2711 or schedule on the United Way website.

Community Partner Agency tours and fairs

United Way partners with 23 agencies. We can arrange for on-site group tours of agencies, or coordinate agency fairs at your organization. Agency tours and fairs give supporters a more in-depth look at the work of Community Partner agencies.

MORE ABOUT LEADERSHIP GIVERS AND LOYAL CONTRIBUTORS

Leadership Giving

The Leadership Giving Circle was established in 1989 as a way to recognize individuals or couples who give at least \$1,000 per year to United Way.

There are currently 479 members of the Leadership Giving Circle who gave more than \$1.1 million, or 20% of the overall campaign. Each year, Leadership Givers are honored at a special event. Also, we publish and distribute an annual Leadership Giving registry as a token of thanks.

Here are some ideas to encourage Leadership Giving in your campaign:

- Talk with the CEO about the importance of Leadership Givers. Some companies hold special meeting for the Leadership donors. Many CEO's of companies who support United Way are Leadership Givers.
- Encourage givers to fill out the Leadership Giving section on the pledge form and give their spouse's name and employer. If a couple's combined giving totals at least \$1,000, they will be recognized as Leadership Givers.

Loyal Contributors

United Way is very fortunate to have many donors who are loyal to our community and our cause. The Loyal Contributors' program recognizes these donors who have given to United Way in any community for 10 years or more.

In Lubbock, more than 2,400 donors have identified themselves as Loyal Contributors. In the last three years, this dedicated group has given more than \$1.9 million. As the campaign coordinator, you can help in the effort to recognize these donors.

Some ideas:

- Have YOU given to United Way for 10 years or more? Many of our campaign coordinators have! Check the box on the pledge form and encourage your co-workers to do the same.
- In campaign meetings, celebrate those who have shown this special level of commitment by asking them to stand.
- Have your CEO send a special note of thanks to these donors.

United Way Glossary

GIVE. ADVOCATE. VOLUNTEER.

We've included a quick reference guide of words and phrases you may hear throughout the Annual Campaign.

Campaign Cabinet - Volunteer division leaders that meet regularly to work on the Annual Campaign.

Combined Federal Campaign (CFC) - The giving campaign for federal government employees, such as individuals who work at the Post Office. This campaign is controlled by federal law and managed independently.

Community Fund - All funds in the campaign go into the Community Fund unless a donor designates a specific agency. United Way has committees of volunteers who evaluate overall community needs and partner agency programs and invest the money wisely. The Community Fund is the best way to help the most people.

Community Impact - The term that United Way uses to sum up how United Way uses all available resources to create sustained improvements in community conditions.

Community Partner Agencies - the 23 local non-profit agencies that receive program specific United Way funds.

Corporate Donation - A donation made from corporate funds, not employee donations.

Donor Designation - Donors can choose to designate their contribution to a maximum of up to two specific Lubbock Area United Way Community Partner agency(ies) or another United Way. A minimum of \$50 per designation is required.

Fair Share Giving - Generally, individuals who choose to give either 1% of their annual salary or one hour's pay per month to United Way. Some companies have their own definition of fair share giving.

Leadership Givers - Lubbock Area United Way donors who give more than \$1,000 a year to the Annual Campaign.



Loaned Executives - Volunteers 'loaned' from area companies to assist United Way with the Annual Campaign. They receive extensive training and are an invaluable resource. They help campaign coordinators with workplace campaign activities and meetings, answer questions about United Way and provide additional resources and supplies to companies as needed.

Loyal Contributor - A donor that has been giving to United Way for ten years or more. These donors can self identify on the pledge form.

Speakers' Bureau - Volunteer speakers that are available to attend workplace campaign meetings. These trained volunteers include Community Partner staff, community volunteers and people who have been served by a United Way Community Partner agency.

State Employee Charitable Campaign (SECC) - A separate workplace campaign for state workplaces such as Texas Tech and Texas Department of Transportation. SECC campaigns are regulated and managed separately.

Campaign Meeting Agendas

Suggested campaign agendas

10 - Minute Meeting Agenda

- | | |
|-----------------------------------------------------------|-----------|
| I. Welcome – CEO or Campaign Coordinator | 1 minute |
| • Brief introduction of why the meeting was called | |
| • Distribute pledge cards with employee names pre-printed | |
| II. United Way 101 – Campaign Coordinator | 2 minutes |
| • The Education Matters Initiative | |
| • 23 Community Partners | |
| • Your company's past participation/goal | |
| III. Show United Way Video – Campaign Coordinator | 5 minutes |
| • Have video set up prior to the meeting | |
| IV. Wrap-up – Campaign Coordinator | 2 minutes |
| • Thank everyone for attending | |
| • Ask co-workers to consider giving a donation | |
| • Allow time for completion of pledge forms | |
| • Collect pledge forms and answer questions. | |

20 - Minute Meeting Agenda

- | | |
|----------------------------------------------------|-----------|
| I. Welcome – CEO or Campaign Coordinator | 3 minutes |
| • Brief introduction of why the meeting was called | |
| • Distribute pledge cards with employee names | |
| II. United Way 101 – Campaign Coordinator | 4 minutes |
| • The Education Matters Initiative | |
| • 23 Community Partners | |
| • Your company's past participation/goal | |
| III. Show United Way Video – Campaign Coordinator | 5 minutes |
| • Have video set up prior to the meeting | |
| IV. Speaker – Speakers' Bureau Volunteer | 5 minutes |
| V. Wrap-up – Campaign Coordinator | 3 minutes |
| • Thank everyone for attending | |
| • Ask co-workers to consider giving a donation | |
| • Allow time for completion of pledge forms | |
| • Collect pledge forms and answer questions. | |

Fun Ideas

Use fun ideas to increase interest.

Casual Dress Day

Allow employees who make a contribution to wear jeans or have a “casual dress day”

Auction

Host an employee auction. Get creative and auction off the best parking spot during campaign; have employees make gourmet lunch boxes to auction; auction a department lunch, or “sleep in late” awards.

Matching Game

Invite employees to try their luck by matching baby and/or pet photos with pictures of management or different departments. Charge employees \$2 per ballot and award the winning entry with a prize.

Food

Host an ice cream social, barbecue, and/or picnic and have employees make a donation to attend.

Tips for Treats

Different departments have treats (anything from chips & queso to brownies, cookies, candy). Employees visit the different departments and ‘pay’ for treats. Any amount can be donated.

Positive Change

Place large water bottles in strategic places and encourage staff to drop off their loose change into these bottles to help make a positive “change” in the community.

Be sure to visit with your company CEO and campaign committee about tailoring the campaign to something that fits your company’s culture.

Some companies have used the following items as incentives to encourage employees to attend a meeting or make a contribution:

- Gas Cards
- Extra vacation day
- Movie passes
- Parking space
- Sporting event tickets
- Restaurant gift certificates
- Theater or concert tickets
- United Way mugs, pens, etc.
- Airline tickets
- Lunch with the CEO
- Leave work early coupon
- Job swapping for the day
- Logo shirts
- Lottery tickets

Frequently Asked Questions

GIVE. ADVOCATE. VOLUNTEER.

Where does my contribution go?

The Community Fund is the best way to help the most people. United Way has committees of volunteers who evaluate overall community needs and partner agency programs and then invest the money from the Community Fund wisely.

Donors have the option to name up to two specific community partners to receive their gift if they so desire. A list of our Community Partners is found on the back of the pledge form.

Who decides how my donation gets spent?

In the spring, trained volunteers evaluate community needs and the services provided by United Way Community Partners. This review assures that all gifts are used in a manner that best meets the needs in the community. These volunteers make funding recommendations to the United Way Board for final approval. If you are interested in helping in this process, please call the United Way office in February or early March.

What about the pressure to give?

Lubbock Area United Way has specific policies against pressuring anyone to give. The decision to give is a personal one and up to each person. No one should be pressured or coerced into giving.

Does United Way fund abortions?

No organization funded by the Lubbock Area United Way is involved in providing abortion services.

How much of my donation stays in Lubbock?

The money raised in Lubbock stays in our area. Our organization sends less than 1% of the total amount raised to United Way Worldwide as our membership fee. This fee provides us with fundraising opportunities at the national level, marketing and staff training support. The United Way Worldwide serves in a national support role and does not directly fund agencies.

**HOW TO
LIVE UNITED
GIVE
ADVOCATE
VOLUNTEER**



Lubbock Area United Way

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