Rise together, so no one stands alone.
YOU MAKE A DIFFERENCE

THANK YOU

You are incredibly important. Why? Number one because you are you. Number two because you have volunteered to serve as your company’s United Way Campaign Coordinator which makes you incredibly important to the more than 120,000 individuals served by Lubbock Area United Way and our Community Partners every year.

Maybe this is your first year to serve in this role. Maybe you’ve been involved for years. Whatever your experience level, our goal and the goal of this guide is to fully equip you to run a great campaign and impact not only your colleagues but thousands of lives across the South Plains. But should you ever have any questions, do not hesitate to reach out to us. We’re here to help.

Thank you for being an incredibly important person and for helping make this year’s Annual Campaign a success!

LIVE UNITED
RISE TOGETHER
MESSAGE FROM THE CAMPAIGN CHAIR

Thank you! Thank you for GIVING • PEOPLE • HOPE in our awesome community by serving as a coordinator in this year's campaign. You are one of over 300 volunteers who donate your time, talents, and passion to support the efforts of Lubbock Area United Way and its Community Partners. Together, we impact over 120,000 of our neighbors, family and friends of all ages, colors, and beliefs in every zip code of our community.

I have had the opportunity to personally visit each one of our 23 Community Partners, and I can tell you there is an unbridled passion to do right by the people in the Lubbock area. That passion comes from a collective choice to rise together rather than let one of our neighbors stand alone. From providing better early childhood education, to confronting child abuse and sex trafficking, and to addressing mental health needs in our community, we must continue to rise together and always choose to help and give hope.

Your work as a coordinator this year will ensure that we rise together and that we continue to GIVE • PEOPLE • HOPE. As your Campaign Chair, I want to personally thank you on behalf of myself and so many in our community. You are the embodiment of Winston Churchill's quote, “You make a living by what you get. You make a life by what you give.”

We appreciate you, your passion, and your dedication, and we look forward to this year's huge success – thanks to you!

[Signature]
**YOUR ROLE**

Campaign Coordinators engage coworkers in building a stronger community by planning, organizing, and coordinating a successful United Way Campaign. Essentially, you are our advocate for your company, helping your colleagues understand the value of United Way across the South Plains.

You are a lifeline between your company and the thousands of individuals and families benefitting from United Way supported programs.

**COORDINATOR ROLE**

- Attend the United Way Campaign Coordinator Training
- Work closely with your company’s leadership
- Work closely with your Loaned Executive/Staff Partner
- Develop an effective campaign plan
- Recruit a team of coworkers to assist you (if needed)
- Hold campaign kickoff and recognition events
- Promote the campaign throughout your company
- Encourage leadership giving in your campaign
- Make your campaign fun
- Thank your donors and volunteers

**COORDINATOR BENEFITS**

- Developing career-building skills
- Networking opportunities
- Being a leader in your company
- Expert knowledge of the value of giving to United Way

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**IMPORTANT DATES**

**CAMPAIGN COORDINATOR TRAINING**

Thursday, August 15, 3:30 PM - 5:00 PM
Bain Conference Center, 5802 4th Street

**CAMPAIGN KICK-OFF LUNCHEON***

Thursday, August 22, 11:30 AM – 1:00 PM
Lubbock Memorial Civic Center

**MID-CAMPAIGN REPORT LUNCHEON**

Thursday, October 17, 11:30 AM – 1:00 PM
Lubbock Memorial Civic Center

**VICTORY REPORT LUNCHEON**

Tuesday, December 3, 11:30 AM – 1:00 PM
Lubbock Memorial Civic Center

Reservations are required for all events. Please email events@unitedway-lubbock.org or call (806) 747-2711.

*There is a cost to attend this luncheon.
ABOUT UNITED WAY

Alongside you, Lubbock Area United Way works to address the root causes of poverty in our community and to create lasting, positive change. Key to our work are programs funded through our Community Partners which contribute to our mission of Giving • People • Hope.

OUR PRIMARY GOALS

- To ensure all children are school-ready by kindergarten and are grade-level readers by 3rd grade.
- To eliminate child abuse and sex trafficking in our communities.
- To provide access to all persons in need of mental health services.

OUR COMMUNITY PARTNERS

- American Red Cross serving the Texas South Plains
- Big Brothers Big Sisters of Lubbock
- Boy Scouts of America, South Plains Council
- Boys & Girls Clubs of Lubbock
- CASA of the South Plains
- Catholic Charities, Diocese of Lubbock
- Children's Advocacy Center of The South Plains
- Communities in Schools on the South Plains
- Early Learning Centers of Lubbock
- Family Counseling Services
- Girl Scouts of Texas Oklahoma Plains
- Goodwill Industries of Northwest Texas
- Guadalupe-Parkway Neighborhood Centers
- Legal Aid Society of Lubbock
- Literacy Lubbock
- Lubbock Children's Health Clinic
- The Parenting Cottage
- The Salvation Army
- Upbring
- Voice of Hope
- Volunteer Center of Lubbock
- Women's Protective Services of Lubbock
- YWCA of Lubbock

COMMUNITY COLLABORATIONS

United Way participates in and supports a number of community-wide efforts such as the South Plains Coalition for Child Abuse Prevention, the South Plains Homeless Consortium, and the Building Strong Families Conference. To find out about all of United Way's community collaborations, visit liveunitedlubbock.org/collaborations.
MAKING AN IMPACT IN OUR COMMUNITY

LIVES IMPACTED
In 2018, United Way funded programs impacted 120,275 lives across the South Plains Region. This includes individuals who received services from multiple Community Partners. Children, parents, and individuals are better equipped to live to their fullest potential because of the remarkable support of United Way donors and volunteers — because of you.

LUBBOCK COUNTY
Lubbock Area United Way Community Partners serve a 15-county area. Within Lubbock, services are not just concentrated in one section of the city. Below is a map showing how many people in each zip code were impacted by United Way services in 2018.
### CAMPAIGN CHECKLIST

<table>
<thead>
<tr>
<th>✓</th>
<th>PLAN YOUR CAMPAIGN</th>
<th>TARGET DATE</th>
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<tbody>
<tr>
<td></td>
<td>Attend United Way Coordinator Training.</td>
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<td></td>
<td>Review the previous campaign's performance, determine opportunities and challenges.</td>
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<td>Meet with your CEO, determine your participation and monetary goals, incentives for giving, and get his/her personal endorsement.</td>
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<td>Recruit a Co-Coordinator or Planning Committee (if necessary).</td>
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<td></td>
<td>Meet with your Loaned Executive to discuss campaign strategies, themes, and develop a calendar of events.</td>
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<tr>
<td></td>
<td>Request materials, speakers, and agency tours through your Loaned Executive. <img src="Campaign" alt="Campaign Resources" /></td>
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</table>
|   | Send a "Campaign Kickoff" invitation from your CEO endorsing and announcing the upcoming campaign. ![Sample Communications](Sample Communications)  
  • Invite Retirees to your kickoff event. |             |
|   | Promote your campaign and distribute your calendar of events. ![Fundraising Ideas](Fundraising Ideas) |             |
|   | Consider incorporating a volunteer opportunity into your campaign. |             |
|   | Visit our website any time for campaign materials and ideas. |             |

### HOLD YOUR CAMPAIGN

|   | Hold kickoff event with Loaned Executive and Speaker.  
  • Make it easy with the Sample Campaign Meeting Agenda (p. 7).  
  • Show the 2019 United Way Campaign Video  
  • Share your story. Why do you give?. |             |
|   | Acknowledge your Loyal Contributors (10+ year donors). |             |
|   | Hold a Leadership Giving, Retiree, and/or Loyal Contributor event. |             |
|   | Conduct special events, agency tour or fair, and other activities. ![Fundraising Ideas](Fundraising Ideas)  
  • Share photos from your events on your company’s social media and tag Lubbock Area United Way. ![Facebook](Facebook) ![Instagram](Instagram) ![Twitter](Twitter) |             |
|   | Make sure every employee receives a pledge form and has the opportunity to give. ![Voluntary Giving Policy](Voluntary Giving Policy) |             |
|   | Publicize community facts and interim campaign results. ![Stories, Community Status Report](Stories, Community Status Report), ![Sample Communications](Sample Communications) |             |

### FINALIZE YOUR CAMPAIGN

|   | Collect pledge forms, calculate results, and submit Campaign Report Form and white copies of pledge forms to your Loaned Executive.  
  • Submit yellow copies to your payroll department.  
  • Donors keep the pink/blue copy. |             |
|   | Review campaign results with your CEO, committee members, and Loaned Executive. |             |
|   | Announce results to all employees. |             |
|   | Thank all donors with a celebration event, letter, or email from your CEO or a visit from a United Way representative. ![Sample Communications](Sample Communications) |             |

### WHAT’S A LOANED EXECUTIVE?

Loaned Executives are area professionals “loaned” by local businesses to help United Way with the Annual Campaign. They are here to assist you with developing your strategy, materials, meetings and other activities, organizing speakers and tours, and any additional support you need.
UNITED WAY’S COMMUNITY FUND

Giving to United Way’s Community Fund is the most efficient and powerful way for you to invest in our community.

• Community needs are assessed and the most critical issues are identified.
• Funding stays local and is based on performance and overall impact on our community.
• Rigorous program oversight is provided by trained United Way volunteers.
• Agencies are visited by trained United Way volunteers to ensure program compliance and progress.
• Yearly reviews of agencies’ financials are conducted.
• Donate conveniently through workplace campaign and payroll deduction.
• Donation is distributed directly to nonprofits.

THE BEST WAY TO GIVE

A gift to United Way’s Community Fund allows you to help more people than a gift to a single nonprofit can.

United Way volunteers from various sectors in the community look for gaps and duplications so Community Fund dollars go to the needs everyone is aware of and to those needs less obvious but no less important.

Your gift to United Way’s Community Fund ensures that your donation is invested where the need is greatest. Donations are monitored to ensure the programs are effective, meet current community needs, and are financially stable and sustainable.

ACCOUNTABILITY

• At United Way, we invest in programs that produce results at agencies that manage their money wisely.
• We are recognized nationally and locally for our high rate of efficiency, earning a 4-Star rating with Charity Navigator and GuideStar Platinum.
• 99 cents of every dollar raised is invested back into the Lubbock area.
• Our most recent 5-year average for fundraising and administration expenses is 14.5%, far below the 35% recommended by the Better Business Bureau’s Standards of Charity Accountability.
TIPS FOR A SUCCESSFUL CAMPAIGN

GET PEOPLE INTERESTED
78% of people are more likely to give a financial donation if they first have a positive engagement experience.

• **Share the story:** Educate employees by inviting a United Way speaker to share a story about the positive impact that donor dollars have on our community.
• **See impact in action:** Experience how important United Way funded programs are to the community by scheduling an agency tour.
• **Volunteer:** Strengthen your team and community by participating in a volunteer project.

Schedule speakers, agency tours, and volunteer projects by contacting your Loaned Executive or United Way staff or visit our website to schedule.

MAKE THE ASK
The #1 reason people don’t give to United Way is that they were never asked.

• **Ask for the pledge:** With new donors, ask for a first-time gift. For annual donors, thank them for their past support and encourage an increase.
• **Answer questions and handle concerns:** Answer questions honestly and if you don’t know the answer ask your United Way representative. [Frequently Asked Questions](#) (p. 12)
• **Leverage incentives:** Employee prizes and incentives are a way to thank employees for participating. No prize is too small. Vacation days, VIP parking, and gift cards are great incentives.
• **Say thank you:** Regardless of what the donor decides, thank them for their time.

LIVE UNITED All Year Long
Businesses indicate that partnering with reputable nonprofit organizations enhances their brand. We provide you with all the tools you need to show donors how United Way is using their gift throughout the year.

• **Share facts and updates:** Send fun facts and stories via emails, newsletters, the intranet, or a bulletin board. [Sample Communications](#) & [Sign-up for United Way’s monthly newsletter](#)
• **Connect on social media:** Advocate for United Way by posting photos of your special event and connect with United Way for year-round updates.
• **Create an annual engagement calendar:** Include Lunch & Learn sessions, holding a supply drive, agency tours and more. Contact United Way staff for more information.

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**SAMPLE CAMPAIGN MEETING AGENDAS**

**10 MINUTE MEETING AGENDA**

I. Welcome (1 min) – CEO or Campaign Coordinator
  • Brief introduction of why the meeting was called
  • Distribute pledge forms with employee names.

II. United Way 101 (2 min) – Campaign Coordinator
  • Focus on Education, Child Abuse and Sex-Trafficking, and Mental Health
  • 23 Community Partners
  • Your company’s past participation and goal

III. Show United Way Campaign Video (3 min) – Campaign Coordinator

IV. Wrap-up (4 min) – Campaign Coordinator
  • Thank everyone for attending.
  • Ask coworkers to consider giving a donation.
  • Allow time for completion of pledge forms.
  • Collect pledge forms and answer questions. (If collecting forms at a later date, be sure to announce the due date.)

**20 MINUTE MEETING AGENDA**

I. Welcome (2 min) – CEO or Campaign Coordinator
  • Brief Introduction of why the meeting was called
  • Distribute pledge forms with employee names.

II. United Way 101 (5 min) – Campaign Coordinator
  • Focus on Education, Child Abuse and Sex Trafficking, and Mental Health
  • 23 Community Partners
  • Your company’s past participation and goal

III. Show United Way Campaign Video (3 min) – Campaign Coordinator

IV. Speaker (6 min) – Speakers’ Bureau Volunteer

V. Wrap-up (4 min) – Campaign Coordinator
  • Thank everyone for attending.
  • Ask coworkers to consider giving a donation.
  • Allow time for completion of pledge forms.
  • Collect pledge forms and answer questions. (If collecting forms at a later date, be sure to announce the due date.)
GIVE MORE THAN A GIFT! GET ENGAGED.

WOMEN UNITED
Women United is a dynamic group of 70,000 business women and community leaders, in 155 communities (within 6 countries), united around creating a stronger community by defining problems and inviting women to be part of the solution. Women have been a driving force behind the rise of community impact through their local United Ways for over 15 years. Far from being transactional donors, women get involved, shake things up, and make great change. Focusing on women’s philanthropy, advocacy, volunteerism, mentoring, and leadership is the work of Women United.

Our local chapter’s signature issue is the prevention of child abuse and neglect. Unfortunately, Lubbock County has one of the highest rates of confirmed cases of child abuse and neglect in the state. Our women are fiercely committed to protecting the precious children in the Lubbock Area through advocacy, mentoring, and financial support for United Way programs and strategies that protect children and strengthen families. Women giving at the Leadership ($1,000+ annually) are invited to get involved. Learn more at liveunitedlubbock.org/womenunited

UNITED WAY YOUTH DIVISION
UWYD is a program for high school students in grades 9-12 seeking opportunities to meet other students from all over the Lubbock area, engage in impactful volunteer projects, and learn about United Way’s work in the community. Coordinated by United Way Community Partner the Volunteer Center of Lubbock, UWYD seeks to create a culture of service and develop the next generation of leaders. By participating in “hands-on” service projects and hearing Community Partner presentations, students receive an in-depth view of problems affecting the Lubbock area, participate in solutions to those problems, and discover how they can be an ongoing influence in their community. UWYD is conducted as a year-round program and youth may sign up at any time throughout the year. Learn more at liveunitedlubbock.org/uwyd

OTHER OPPORTUNITIES
Lubbock Area United Way offers many opportunities to get involved. Consider serving on a committee dedicated to the transparency, program development, or financial development of United Way and our 23 Community Partners. Find out about other ways you can volunteer for the Annual Campaign such as the United Way Speakers’ Bureau. Plan a hands-on volunteer project for your office. Visit our website to find out how to get started. Learn more at liveunitedlubbock.org/get-involved
WHAT YOUR DOLLARS CAN DO

Your gift, no matter what size, makes a difference. Plus, the dollars you give to United Way’s Community Fund stay right here in the Lubbock Area. For the cost of everyday items and activities, you can provide urgent and life-changing resources that impact people throughout the 15 counties served by United Way and our Community Partners.

LEADERSHIP GIVING

Leadership Givers serve as a collective voice of community members fighting for the health, education, and financial stability of every person across the South Plains. Established in 1989 as a way to recognize individuals and couples giving $1,000 a year or more, the Leadership Giving Circle plays a significant role in the success of the Annual Campaign, Lubbock Area United Way, and our community. Many of these givers also volunteer through the campaign, our Community Impact Division, committees, or our Board of Directors.

It’s easy to encourage donors to add their name to this collective voice:

- **All it takes is $20 a week to become a Leadership Giver.** That gift could provide 24 weeks of quality, affordable day care for 1 child. Or it could provide support services for 21 victims of sexual assault or sex trafficking.
- **Visit with your CEO about the importance of Leadership Givers.** Consider holding a special meeting just for Leadership Givers as a way to say “thank you”. Many CEOs 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 $1,000 or more, they will be recognized as Leadership Givers.
UNITED WAY SPEAKERS’ BUREAU

Personal stories of United Way’s impact in our community bring to life the importance of giving to your coworkers. Our trained volunteer speakers include Community Partner staff, community volunteers, and individuals served by United Way funded programs. Their 5 to 7 minute presentations make a genuine difference as part of your Workplace Campaign meeting. Having a speaker at your meeting is one of the very best ways to reach the hearts and minds of your coworkers.

United Way Speakers are available to speak to any size group at any time of day on any day of the week.

3 EASY WAYS TO SCHEDULE:
- Ask your Loaned Executive to book a speaker.
- Contact the United Way office at (806) 747-2711.
- Fill out the Speaker Request Form at liveunitedlubbock.org/speakerrequests

“We have always used a speaker at our UW Campaign meeting. It helps our employees truly understand what UW is able to accomplish with our pledges, especially when the speaker has been a recipient of the services provided by UW. This year’s speaker was INCREDIBLE! Several employees told us this was the best campaign ever!”

“Having a speaker helps our employees to see exactly where the money is going and puts it on a more personal level.”

AGENCY TOURS AND FAIRS

There is no better way to help your coworkers see their dollars in action than agency tours. We tailor tours to fit your needs. Each individual agency tour takes approximately 30 minutes. Consider planning a morning or afternoon to tour 4 to 5 agencies. Or plan a week of tours, touring one agency each day.

Agency Fairs bring to life the amazing work of our 23 Community Partners. Opening up your boardroom, conference room, or break room for an Agency Fair, gives your coworkers the opportunity to ask questions and engage one-to-one with the work of United Way funded programs.

Visit with your Loaned Executive or call the United Way office to schedule.
FREQUENTLY ASKED QUESTIONS

Where does my contribution go?
All funds in the Campaign go into the Community Fund unless a donor designates a specific agency or other United Way. On an annual basis, United Way Volunteers evaluate overall community needs and United Way funded programs. Money is then allocated based on these evaluations and the recommendations of the volunteer committees. The Community Fund is the best way to help the most people and meet the greatest needs in our community.

Who decides how my gift is 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 of our community. These volunteers make funding recommendations to the United Way Board of Directors for final approval. To find out more or to find out how you can volunteer, visit our website.

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 individual. No one should be pressured or coerced into giving. Read Lubbock Area United Way’s full Voluntary Giving Policy and Donor Bill of Rightst at liveunitedlubbock.org/resources

How much of my donation stays in Lubbock?
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.

How much of my contribution goes to help people?
Lubbock Area United Way’s most recent 5-year average for fundraising and administration expenses is 14.5%. This percentage is far below the 35% recommended by the Better Business Bureau’s Standards of Charity Accountability. Outside of these expenses, every dollar given goes toward helping people in the Lubbock area.

Under the new tax law, is my gift still tax deductible?
Yes, the new tax law still allows you to deduct your charitable giving. The major change is the doubling of the Standard Deduction which means fewer people will itemize their taxes going forward.

Can I give my gift to a specific agency?
Yes, the designated contribution section at the bottom of the pledge form allows donors to pick a specific agency to receive their gift. The donor may pick a maximum of two Lubbock Area United Way Community Partners (listed on the back of the pledge form) or another United Way. Donors may give to both the United Way Community Fund and to a specific agency or other United Way. There is a minimum of $50 for each selection.

Does Lubbock Area United Way fund abortions?
No organization funded by Lubbock Area United Way is involved in providing abortion services.

As a Campaign Coordinator, what if I get a question that I don’t know how to answer?
Don’t be afraid to say you don’t know. Get the person’s name and phone number and contact the United Way office. A United Way volunteer or staff member will follow up with the person. United Way’s website also offers extensive information. liveunitedlubbock.org
HOW TO COMPLETE FORMS

Complete the pledge form in 3 easy steps:

1. Fill in contact information at the top.

2. Choose how you want to give.

3. Sign your name.

Where does each copy go?
White: United Way
Yellow: Your Payroll Dept
Pink/Blue: The Donor

The designated contribution section allows donors to select a specific Community Partner to receive their gift. **Donors may pick a maximum of two Lubbock Area United Way Community Partners** (listed on the back of the form) or **another United Way** (for instance, a donor who lives in Plainview but works in Lubbock may wish to donate to Plainview Area United Way). **There is a minimum of $50 for each selection.** Undesignated gifts are automatically allocated to the Community Fund.
CAMPAIGN REPORT FORM

Company/Organization Name

Address

City/State/Zip Code

FOR OFFICE USE ONLY:

Batch No.

Lubbock Area United Way
1655 Main Street, Suite 101
Lubbock, TX 79401
tel 806.747.2711 / fax 806.742.2716
liveunitedlubbock.org

Company Coordinator                                                                                                                        Date

United Way Volunteer                                                                                                                        Date

Received By                                                                                                                                       Date

THANK YOU!

No. of Givers Pledge amount

Add all gift amounts
from pledge forms

Payroll Deduction

One-Time Gift: Cash/Check

Direct Bill

Bank Draft

Other: Credit/Debit or Stock/Securities

TOTALS

Amount in this box equals all
attached pledge forms.

SPECIAL INSTRUCTIONS (IF APPLICABLE)

SIGNATURES

Company Coordinator Date

United Way Volunteer Date

Received By Date

To Complete the Report Form:
• Record all donations and provide totals.
• Remember to include the contact person at your organization that handles payroll deduction pledges.
• Checks should be made payable to Lubbock Area United Way.
• Submit your form along with the white copies of the pledge forms to your Loaned Executive or drop off at the Lubbock Area United Way office.

Where does each copy go?
Green: United Way
Yellow: Your Payroll Dept
Pink: Yours to keep