

ADVANCING EDUCATION  
INCOME AND HEALTH

# EMPLOYEE CAMPAIGN CHAIR GUIDE 2014

GIVE. ADVOCATE. VOLUNTEER.

United Way of  
Northeast Florida  
[www.unitedwaynefl.org](http://www.unitedwaynefl.org)





## Dear Employee Campaign Chair:

Thank you for your commitment to lead your organization's 2014 United Way Campaign. As an Employee Campaign Chair, you will have the opportunity to demonstrate your management and organizational skills while expressing your creativity and gaining professional experience in project management, team building and event planning. Most importantly, you will be making a BIG impact on our northeast Florida community.

Because of the monumental impact and outstanding results that volunteers like you achieve year after year, the United Way Campaign Cabinet selected Big Results. Big Impact. as this year's overall campaign theme. The dedicated support of donors and volunteers is contributing to higher graduation rates, more children ready to start kindergarten, families achieving financial stability and people leading healthier, more productive lives.

Together, we are making a difference. Our focused efforts are producing positive outcomes in education, income and health - the building blocks to a quality life. With your help, we will achieve even bigger results with an even bigger impact. Please reference this booklet as a guide to the United Way campaign process. We encourage you to customize your campaign to your organization's culture and values, and we look forward to hearing your creative approaches to raise awareness and generate support.

Again, thank you for bringing your passion and expertise to the LIVE UNITED movement. We look forward to accomplishing Big Results and making a Big Impact!

Sincerely,



Pat Geraghty  
2014 United Way Campaign Cabinet Chair  
Florida Blue Chairman and CEO

### **United Way of Northeast Florida**

**Mailing Address:**

**P.O. Box 41428 • Jacksonville, Florida 32203-1428**

**Street Address:**

**1301 Riverplace Blvd., Suite 400 • Jacksonville, Florida 32207**

**Phone (904) 390-3200 • Fax (904) 390-7373**

**[www.untedwaynefl.org](http://www.untedwaynefl.org)**

# CONTACT LIST



## VOLUNTEER LEADERSHIP 2014-2015

Board of Trustees Chair	Frank Martire, FIS
Board of Directors Chair	Anna Brosche, Ennis Pellum & Associates
Campaign Cabinet Chair	Pat Geraghty, Florida Blue
Campaign Advisory Council Co-Chairs	Jack Hunt, Availity Jarret Dreicer, Baptist Health System
Resource Management Cabinet Chair	Brooks Stone, Florida Blue
UWADA (United Way Agency Directors Association) Chair	Kymberly A. Cook, Children's Home Society of Florida, Buckner Division
Community Impact Council Chair	Barbara J. Drake, Barbara Drake Trading LLC
Education Committee Chair	Michael Ward, CSX
Success By 6 Partnership Chairs	Reneè Finley, Florida Blue
Life: Act 2 Partnership Council Chair	Becky Gay, Florida Blue

## STAFF LEADERSHIP

Michelle Braun	President and CEO	(904) 390-3253	michelleb@uwnefl.org
Lisa Daniel	Vice President of Marketing and Communications	(904) 390-3242	lisad@uwnefl.org
Coretta Hill	Vice President of Volunteer & Community Engagement	(904) 390-3231	corettah@uwnefl.org
Connie Hodges	Executive of Philanthropic Outreach	(904) 390-3218	connie@uwnefl.org
Patricia Kilgore	Vice President of Finance and Administration	(904) 390-3210	patricia@uwnefl.org
Kim Namey	Vice President of Resource Development	(904) 390-3212	kimk@uwnefl.org
Melanie Patz	Vice President of Community Impact	(904) 390-3243	melaniep@uwnefl.org
Taylor Shead	Vice President of Major Gifts and Legacy Giving	(904) 390-3234	taylors@uwnefl.org

## DIRECTORS AND MANAGERS

Jackie Artybridge	Resource Development Manager	(904) 330-3952	jackiea@uwnefl.org
Sharon Clark	Director, Legacy Giving	(904) 330-3951	sharonc@uwnefl.org
Amy Dyar	Resource Development Manager	(904) 390-3239	amyd@uwnefl.org
Alecia Givens	Resource Development Manager	(904) 390-3288	aleciag@uwnefl.org
Matt Lynch	Resource Development Manager	(904) 390-3224	mattl@uwnefl.org
Sara McMillan	Director, Major Gifts	(904) 390-4016	saram@uwnefl.org
Gracie Simendinger	Resource Development Manager	(904) 390-3216	gracies@uwnefl.org
Emily Williamson	Manager, Affinity Groups	(904) 390-3236	emilyw@uwnefl.org

## ADMINISTRATIVE SUPPORT

Kimberly Waithe	Administrative Assistant, Resource Development	(904) 390-3215	kimberlyw@uwnefl.org
-----------------	--	----------------	----------------------

## CFC (Combined Federal Campaign) & FSECC (Florida State Employees' Charitable Campaign)

John Smith	CFC & FSECC Regional Director	(904) 390-3272	johns@uwnefl.org
Gloria Roesler	CFC Associate Specialist	(904) 390-3223	gloria@uwnefl.org

## Overview of United Way of Northeast Florida

The Community Impact Fund .....	8
Facts At A Glance .....	9
Community Impact .....	10
Q & A .....	11

## Steps for a Successful Campaign

Key Campaign Dates .....	15
Campaign Checklist .....	16
Steps To A Successful Campaign .....	17
Community Champions Awards .....	25
Online Pledging .....	27

## Leadership Giving

What Is Leadership? .....	31
Leadership Circle Levels .....	32
Tocqueville Society & Challenge Grants .....	33
Loyal Donors and Diamond Donors .....	34

## Fun In Fundraising

Fun In Fundraising .....	35
--------------------------	----



# OVERVIEW

## OF UNITED WAY OF NORTHEAST FLORIDA

There's so much more to United Way of Northeast Florida than fundraising. In this section, you will learn how United Way works to advance the common good and change lives by creating lasting change in education, income and health. Through its Community Impact Fund, United Way is investing in our community's future by keeping students on track to graduation, helping families achieve financial stability and providing people the tools to lead healthy lives. Together, we can accomplish more than any single group can on its own. When we reach out a hand to one, we influence the condition of all. We invite you to join us in advancing the common good in northeast Florida because good things happen when we LIVE UNITED.



United Way  
of Northeast Florida

# THE COMMUNITY IMPACT FUND

## The most powerful way to invest your contribution

### WHY IS THE COMMUNITY IMPACT FUND SO IMPORTANT?

The Community Impact Fund **“UNITES”** your gift with thousands of others to create the **GREATEST IMPACT** on our community. Donations to the overall fund **ADVANCE THE COMMON GOOD** by focusing on **EDUCATION, INCOME AND HEALTH** – the **BUILDING BLOCKS** to a quality life. Through United Way’s Community Impact Fund, we invest in **MEASURABLE SOLUTIONS** to keep students on track to **GRADUATION**, help families achieve **FINANCIAL STABILITY** and provide people the tools to lead **HEALTHY** lives. We hold ourselves and our impact partners **ACCOUNTABLE** for results.

The Community Impact Fund enables us to evaluate programs, **MONITOR RESULTS** and continuously improve our initiatives to **CREATE LASTING, POSITIVE CHANGE**.

All programs and initiatives are **EVALUATED** by trained volunteers and staff who review program **RESULTS**, agency financials and stability. Each year results are reported to the community to keep donors informed of their investments and **IMPACT**.

### A CLARIFICATION ABOUT DESIGNATIONS:

By supporting the CIF you are helping to fund 77 programs operated by 57 agencies focused on education, income and health. If you choose to direct your donation to address another issue, we only ask that contributions given through United Way be allocated to health and human service organizations – which do not typically include religious, alumni, arts and culture or animal rights groups.

United Way has a long-standing policy that states all donations given through United Way will be provided to only health and human service organizations. While churches, private schools, animal rights and arts and culture groups are not typically considered health and human service organizations, they may offer some services that are in line with United Way’s policy, such as:

- a church’s food pantry
- a private school that funds scholarships for at-risk children
- therapeutic and healing services offered by arts organizations
- animal groups that provide service animals

If you choose to designate to an organization offering one of the above, please specify the health and human service need that is being met.

Designations are not monitored for impact, aligned with United Way’s Community Impact Agenda, nor considered when determining funding allocations to programs.



## What Is United Way?

United Way of Northeast Florida is committed to creating lasting, positive social change by addressing barriers to receiving a quality education, achieving financial stability and living a healthy and engaged life. With the help of more than 10,000 volunteers, United Way of Northeast Florida focuses resources on solutions to improve education, income and health, the building blocks of a good life. Volunteers help study issues, develop priorities, raise money, attract resources, invest dollars, evaluate programs and provide financial oversight.

We are committed to mobilizing the caring power of our communities to give, advocate and volunteer to create opportunities for a better life for all. Working together, we leverage the resources available in our communities that support innovative approaches to address the obstacles that prevent individuals and families from achieving their potential. People like you are the heart of this effort, working together, donating time and energy to create a brighter future and advance the common good.

### MISSION

United Way provides leadership, resources and focus to change lives in our community by creating sustainable improvements in education, income and health.

### VISION

United Way of Northeast Florida is a leader in ensuring:

- Children enter kindergarten ready to succeed and students stay in school through graduation
- Individuals and families have the opportunity to achieve financial stability
- People have the opportunity to lead healthy and engaged lives

### VALUES

In pursuing our mission, the following principles guide our relationships with stakeholders including donors, volunteers, partners, employees and the communities we serve.

#### **Excellence**

We engage the community with professionalism and quality support.

#### **Compassion**

We believe in the dignity and worth of every individual and place our highest priority on serving local people in need.

#### **Collaboration**

We involve and unite the local community knowing that respect, diversity and inclusiveness make us stronger.

#### **Innovation**

We seek fact-driven, creative and sustainable solutions to our community's most pressing social problems.

#### **Integrity and Fairness**

We resolve to maintain the highest standards of personal and organizational honesty in all our activities.

#### **Accountability**

We are proactive and responsive to our stakeholders through consistent communication, the delivery of relevant and high-quality services, and the effective measurement of all programs and initiatives.

#### **Effectiveness**

We continuously review our results and commit to using our resources and expertise in the most efficient and innovative manner.

## Our Impact

United Way's Community Impact Fund is the public giving vehicle that provides the resources to improve lives and build stronger communities. When you give to United Way's Community Impact Fund, you can be sure your gift is going where it will make the most impact. We make decisions based on research, using local experts to develop strategies that make a difference not just for today, but for our community's future.

We recruit the people and organizations from all across the community who bring the passion, expertise and resources needed to get things done. We have developed partnerships with businesses, funders, government entities as well as nonprofit and community organizations to create sustainable change that addresses the three components that are the building blocks of successful lives and thriving communities: education, income and health.

### Local Effectiveness

Every gift makes a difference. Whether it is \$10, \$100, \$1,000 or \$100,000, your donation matters. When "united" with thousands others in the Community Impact Fund, the combined contributions deliver the greatest impact on our community.

### Accountability

United Way of Northeast Florida is led by local volunteers who direct and monitor the investment of Community Impact Fund dollars. United Way tracks 24 community indicators for measurable results.

Through United Way's Community Impact Fund, we invest in measurable solutions, evaluate programs, monitor results and continuously improve our initiatives. We hold our impact partners and ourselves accountable.

### Convenience & Organization

With donations spread out through the year, United Way's payroll deduction offers convenience and the opportunity for many to give more.

United Way's Community Impact Fund maximizes contributions by investing in proven solutions that advance the common good. One single gift to the Community Impact Fund keeps students on track to graduation, helps families achieve financial stability and provides people the tools to lead healthy lives.

## EDUCATION

Helping to make sure students are ready to learn and stay on track through graduation. Success By 6 is a two-year scholarship program for working families with three-year-old children. ReadingPals matches passionate, committed, trained volunteers with pairs of four-year-olds to help them get ready for kindergarten. Achievers For Life (AFL) is a research-based dropout prevention strategy focused on 6th grade students who are at-risk for academic failure. Youth Employment is a six-week summer internship for low-income youth ages 16-19, that provides job skills, readiness training, individual coaching and meaningful internship experiences aligned with Jacksonville's target industries.

## INCOME

Helping families achieve financial stability. The RealSense initiative focuses on improving the prosperity of our community's most economically-challenged citizens. Free financial education classes, free tax preparation and enrollment in a matched savings program are the core areas of service offered.

## HEALTH

Helping people lead healthy productive lives. Life: Act 2 focuses on the health of the elderly, especially in the two week after being released from the hospital. Full Service Schools of Jacksonville is a collaborative approach to meet the therapeutic, health and social service needs of students and families in Duval County. 2-1-1 is the easy to remember, three-digit telephone number that connects callers from throughout Northeast Florida to health, social and human services and more than 3,800 community partners. It is also accredited by the American Association of Suicidology and serves as our community's suicide intervention hotline.

More detailed information on our community impact areas, community collaborations and partner agencies is available on our website, [www.unitedwaynefl.org](http://www.unitedwaynefl.org)

### **1. What is United Way of Northeast Florida?**

United Way is a nonprofit organization that works in partnership with volunteers, community organizations and local community leaders to improve education, income and health – the building blocks to a quality life for all in the northeast Florida community.

### **2. How is United Way of Northeast Florida governed?**

United Way is governed by a volunteer Board of Directors and a volunteer Board of Trustees. The Board of Directors oversees the operations and helps carry out policies for all major functions of United Way, while the Board of Trustees makes all policy decisions for United Way.

### **3. What is United Way of Northeast Florida's relationship with United Way Worldwide?**

United Way Worldwide is a service association to which local United Ways belong. United Way of Northeast Florida is governed locally by a volunteer Board of Trustees and Board of Directors. Because of the association, United Way of Northeast Florida receives training for staff and volunteers, campaign analysis, market research, advertising and human resources assistance.

### **4. Why is the Community Impact Fund so important?**

The Community Impact Fund unites your gift with thousands of others to create the greatest impact on our community. Donations to the overall fund advance the common good by focusing on education income and health – the building blocks to a quality of life. Through United Way's Community Impact Fund, we invest in measurable solutions to keep students on track to graduation, assist families in achieving financial stability and provide people the tools to lead healthy lives.

### **5. How is United Way making sure my Community Impact Fund gift is well spent?**

The Community Impact Fund enables United Way to evaluate programs, monitor results and continuously improve our initiatives to create lasting positive change. All programs and initiatives are evaluated by trained volunteers and staff who review program results, agency financials and stability. Each year, results are reported to the community to keep donors informed of their investments and impact.

### **6. How can United Way afford its advertising?**

United Way Worldwide provides national and local commercials to United Way of Northeast Florida at little or no cost. Newspapers, electronic media and corporate advertisers are great supporters of United Way, donating or reducing costs for time and space. In addition, many companies make "in-kind" donations to offset the cost of some materials or events.

### **7. What is United Way's policy against pressuring employees to give?**

United Way of Northeast Florida is against coercion. Its policy states that under no circumstances should an employee be threatened or coerced into contributing. Giving is a personal matter and a personal decision; whether people give and how much they give is up to each individual. The purpose of United Way is to offer people an opportunity to help others through their giving.

### **8. If I stop working, what happens to my pledge?**

Should you stop working, your payroll deduction pledge also stops. Your pledge through United Way is made in good faith based upon your employment. If you would like to fulfill the remainder of your pledge, you can write a check, pay by credit card or have United Way bill you directly. When you start a new job, ask to sign up for payroll deduction again or call United Way at 390-3200 for more information.

### **9. Is my United Way contribution tax deductible?**

Yes, the Internal Revenue Service (IRS) has determined that United Way of Northeast Florida is eligible to receive tax-deductible contributions under section 501(c)(3) of the Internal Revenue Code.

### **10. Why does United Way hold group meetings or rallies?**

United Way holds group meetings or rallies to describe the community's needs and explain how individual investments help United Way meet those needs. It is up to each company and organization to determine the method used to reach employees.

### **11. How do I find information about agency services when I need help?**

For more information about agency services, please call 2-1-1. United Way's 2-1-1 is an information and referral help line covering topics from child and adolescent mental health counseling to emergency financial assistance. 2-1-1 operates 24-hours a day, seven days a week.

## 12. What is United Way's overhead?

United Way's overhead calculation meets United Way Worldwide Standards of Excellence and is consistent with not-for-profit reporting. This standard uses the IRS Form 990, giving donors and watchdog organizations easy access to reported data for increased comparability. Using this method, United Way's overhead, based on the most recently filed Form 990 for fiscal year ended June 30, 2013, is 10.43%.

NOTE: The Better Business Bureau's Wise Giving Alliance suggests total fundraising and administrative costs not exceed 35 percent of total income. United Way of Northeast Florida is pleased that our overhead costs fall well below that threshold.

## 13. A clarification about Designations:

When you give to the United Way Community Impact Fund, you can be sure your gift is going to where it will have the most impact. Through the Community Impact Fund, we invest in measurable solutions that create significant lasting change. We believe education, income and health are the building blocks to a good life. If you choose to direct your donation to address another issue, we only ask that contributions given through United Way be allocated to health and human services organizations – which do not typically include religious, alumni, arts and culture or animal rights groups.

# STEPS

## TO A SUCCESSFUL CAMPAIGN

### ECC Responsibilities

- Attend one training workshop.
- Recruit an enthusiastic team (for larger employee groups) to help plan and implement a fun, successful campaign.
- Work with Leadership Giving Chair (LGC) on the company's Leadership Giving campaign, if applicable.
- Work closely with United Way staff and your Community Builder to establish organizational campaign goals, timeline, and plan of action.
- Evaluate the campaign, submit final reports, and make recommendations for next year.
- Maintain accurate campaign results and report them promptly to United Way.
- Follow-up thoroughly on all aspects of the campaign and thank all employees.
- Work very closely with United Way staff and employees to resolve problems.
- Announce the results to the entire organization.

### WHAT IS AN ECC?

*The Employee Campaign Chair (ECC) is responsible for planning, organizing and implementing an effective United Way employee campaign within the ECC's own organization.*

United Way volunteers contact the chief executive in local organizations and ask for his or her commitment to United Way. The head of the organization then appoints an enthusiastic person to organize the employee campaign - that person is called the ECC.

The ECC, in turn, recruits other enthusiastic individuals within the organization to contact their fellow employees (on a peer-to-peer basis) and tell the United Way story. In addition to communicating United Way facts, they also ask for and collect pledges from their peers and route them back to the ECC. This ask can take place in either a one-on-one or group setting, and can be creative and fun. Finally, the ECC reports their company's results to the United Way relationship manager.

The whole process is facilitated with educational and campaign support provided through United Way. United Way staff members and Community Builders are available to assist the ECC and the committee in any way. Community Builders, loaned or sponsored employees from United Way's partner companies, serve as an extension of United Way's staff and are available to help you with every aspect of your organization's campaign.



United Way  
of Northeast Florida



## **CAMPAIGN 2014 - ECC TRAININGS**

*Interactive and information-packed workshops designed to help United Way Employee Campaign Chairs and Leadership Giving Chairs run exciting and successful campaign*

<b>Wednesday,</b>	<b>July 9</b>	<b>8:30 – 11:30 AM • United Way Boardroom</b>
<b>Thursday,</b>	<b>July 24</b>	<b>8:30 – 11:30 AM • United Way Boardroom</b>
<b>Wednesday,</b>	<b>August 6</b>	<b>8:30 – 11:30 AM • United Way Boardroom</b>
<b>Thursday,</b>	<b>September 11</b>	<b>8:30 – 11:30 AM • Baptist Medical Center Nassau</b>
<b>Tuesday,</b>	<b>September 16</b>	<b>8:30 – 11:30 AM • United Way Boardroom</b>

## **COMMUNITY BUILDER ASSIGNMENT BEGINS**

**August 2014**

*A number of organizations loan or sponsor an employee to United Way to help in the campaign effort.*

## **UNITED WAY CAMPAIGN KICKOFF**

**October 8, 2014**

*Celebratory event to mark the official launch of Big Impact. Big Results. a community-wide fundraising, where pacesetter results are announced.*

## **UNITED WAY COMMUNITY VOLUNTEER PROJECTS**

**June 2014 – June 2015**

*United Way supporters, organizations, and their employees participate in individually planned community service projects that demonstrate the impact of United Way. Past projects include hands-on activities with children, program site improvements, and building a community park.*

## **EMPLOYEE CAMPAIGN COMPLETION - RESULTS FORWARDED TO UNITED WAY**

**December 2014**

*Campaign totals and audit documents are due to United Way for the announcement of the final campaign results at the Community Celebration.*

## **COMMUNITY CELEBRATION**

**Spring 2015**

*Celebrating the total dollars raised to be invested in creating sustainable change in education, income and health to improve lives in our community; recognizing outstanding organizations for their leadership and campaign performance.*

## Campaign Checklist

### Pre-Campaign

- Review past performance, determining strength and weakness of previous campaign.
- Attend ECC training.
- Meet with your United Way representative to develop campaign goals and strategies.
- Meet with your CEO to confirm his or her commitment.
- Recruit and train a campaign team.
- Develop a theme.
- Set dates for employee meetings and Community Impact tours.
- Personalize pledge forms.
- Order campaign materials.
- Develop an incentive program.
- Send communications from CEO endorsing/announcing campaign.
- Publicize the campaign.
- Plan a leadership event.
- Meet with Human Resources to discuss Retiree's Program/New Hire Program.

### Campaign

- Complete leadership event prior to kickoff.
- Kick off your campaign.
- Conduct group meetings.
- Publicize interim reports.
- Wrap up campaign, complete contacts and account for all pledges.

### Post Campaign

- Request New Hires insert and give to Human Resources Department for employees hired after the campaign.
- Tabulate the results and submit campaign reports to United Way.
- Give payroll deduction forms to payroll department.
- Publicize campaign results.
- Conduct a thank-you program for all contributors.
- Conduct a campaign evaluation with your team and develop a written summary for next year.



## 1. Plan

### A. EVALUATE PAST PERFORMANCE

Schedule a meeting with your United Way representative to review a data analysis of the past year's campaign. Think about the answers to these questions based upon last year's campaign:

- In what areas/departments did your company's campaign work well?
- What are the most likely areas of improvement?
- What community issues are most important to your company?
- How was Leadership Giving emphasized?
- What percentage of your campaign total was directed toward the Community Impact Fund?

### B. SET CHALLENGING GOALS AND PLAN YOUR STRATEGY

It's important to establish a campaign giving goal that encourages employee motivation and a sense of accomplishment. Consider a goal based on one or more of the following suggestions:

#### Goal Planning

- Increase employee per capita.
- Increase the percentage of employee participation.
- Increase the number of Leadership Givers through a specialized Leadership Giving campaign.
- Increase Community Impact Fund percentage of campaign.
- Increase the number of people engaged in volunteer projects.

#### Planning Strategies

- Develop a campaign theme.
- Create a public and active campaign to educate all employees about United Way's Community Impact Fund.
- Become a member of United Way's Community Champions award program for 2013, see page 19 for more details.

### C. MEET WITH TOP MANAGEMENT TO DISCUSS A CAMPAIGN GOAL & THEIR INVOLVEMENT FOR THIS YEAR

With last year's results in hand and a potential goal in mind, set a meeting with your CEO. Reaching this goal depends, to a great extent, on the commitment of your CEO. The following best practices will turn your CEO into a champion of the United Way campaign:

- Present campaign materials for both Leadership and Employee Giving (United Way can provide you with this information).
- Request the time and resources needed to hold a fun, educational, non-coercive campaign that asks every employee to invest. The more involved your CEO is in these processes, the more likely employees are to get involved as well.

Note: United Way staff and top volunteers are available to meet with your CEO and discuss your campaign.

## 2. Recruit & Train Your Team

### A. RECRUIT

- Consider forming your campaign team around company structure, i.e. departments, work groups, or geographically.
- Your campaign team can help spread enthusiasm and information about United Way and your company campaign.
- Even if your organization is small, it is beneficial to have help with the campaign.

## • **Good team members:**

- Are members of the Leadership Circle
- Are enthusiastic members of last year's team
- Benefited from, or volunteered for, a United Way program
- Have served on United Way's Resource Management Teams
- Participated in volunteer activities
- Represent a variety of departments in your company
- Coordinate the company newsletter, public relations, communications, or marketing
- Are labor union leaders (if appropriate)

## **B. TRAIN**

On-site training for your team can be customized in increments to fit your company's available time. Training can be done in "Lunch and Learn" style, and sessions are designed to help you choose strategies and messages that will work in your organization.

What better way to drive home the message of United Way than to hold your campaign training at a United Way-supported program and then work on a service project to benefit the recipients? Employees can see the variety of services the program offers and the clients being helped. Their day can also include lunch and instruction about the roles of campaign team.

## **3. Develop a Leadership Campaign**

One of the important parts of a successful campaign is conducting a leadership event. By running your leadership campaign one to two weeks prior to your general campaign, your leadership donors set the pace for others to follow.

### **Recruit a Leadership Coordinator & Team**

- Recruit a respected senior staff member and current leadership giver to act as a leadership coordinator and conduct the Leadership Giving Campaign.
- Depending on the size of your company, consider recruiting additional individuals to help with your Leadership Giving Campaign.

### **Plan Your Leadership Giving Program**

- Establish the timing of the Leadership Giving Campaign.
- Review last year's efforts and results.
- Set a realistic and attainable goal for new leadership gifts and total Leadership Giving.

### **Create a Prospect List**

- Employees who gave at leadership levels last year
- Current donors of \$500 or more
- Employees at your company whose annual salary is \$50,000 and up
- Employees receiving stock or stock options as part of their compensation package
- Retirees who were past donors; inviting them to continue leadership roles

### **Communicate Your Leadership Giving Plan**

- Develop and publicize the company goal for Leadership Giving in addition to the overall campaign.
- Invite prospects to a special breakfast, luncheon, or reception to present benefits of Leadership Giving.
- Distribute brochures, pledge forms and other appropriate information. When possible, personalize the materials with the individual's name.
- Remember to include information on the Weaver Challenge.

## Helpful Hint

The number one reason that people do not give to charitable organizations is because they are not personally asked to do so.

Who knows how many of the people you ask to give this year will do so just because you made the extra effort?

# STEPS TO A SUCCESSFUL CAMPAIGN

## Thank Your Contributors

- Send a thank-you note to contributors and members of your team.
- Host a reception to acknowledge and thank leadership contributors.
- United Way of Northeast Florida also sends each leadership contributor a personal thank-you note.
- Encourage leadership donors to attend United Way's Annual Campaign and Leadership Celebration.

## 4. Promote

You have planned; now it is time to put the plan into action!

- Develop a theme.
- Personalize pledge forms - include essential information: name, employee number/payroll number, etc.
- Send reminders about rally dates and times.
- Don't forget email and voice mail messages (some sample email messages are on the United Way website).
- Add personal messages to your company's online pledging website, if using an eWay campaign.
- Videos, posters, and goal thermometers.

## 5. Educate

The core to implementing and managing your campaign is to hold employee educational rallies/meetings.

The key elements to include in your campaign plan are:

- Community Volunteer Project (Coordinated by United Way's staff support)
- Community Impact speakers
- Community Impact tours or reverse tours  
(consider having program recipients come to your organization for a tour)
- Printed materials, publications, reports, displays and banners
- Special events that creatively engage employees in the campaign
- United Way success stories in your company newsletter
- Community Impact presentations during employee rallies and community impact statistics (talk to your Resource Development Manager)
- Employee testimonials

## 6. Conduct Employee Meeting

### ADVANTAGES TO CONDUCTING GROUP PRESENTATIONS

- Information is provided quickly and efficiently.
- A meeting provides a format so that a consistent message is delivered.
- Less follow-up work is required when you collect pledge forms at the end of a meeting.
- These meetings accommodate the work schedule of all areas of the organization.
- Prospective contributors are removed from work area distractions.
- Employees have a forum for questions in a comfortable setting with your United Way representative or Community Builder.

The most common and effective way to provide your employees with information about United Way and our impact in the community is at a rally or group meeting. Rallies vary in time and content, but most include the following components:

### Don't Worry... We'll Arrange Everything

There's no need for you or your organization to worry about arranging speakers or tours. Before calling your Campaign Manager or Community Builder, please have the following information ready for him/her:

- Company name
- Street address
- Contact name and phone number (you may provide more than one contact name)
- Type of program request (speaker or tour)
- Date(s) of event
- Time(s) of event
- Size of audience
- Type of audience (managers, line workers, etc.)
- Directions/location of rally/meeting (please include building name, floor, room number, etc.)
- Any special requests (a particular agency, speaker or focus issue)

## The 20-minute rally

### 1. Welcome (2 Minutes)

Employee Campaign Chair welcomes employees and explains the purpose of the campaign and how the company will support the campaign (company activities).

### 2. Endorsement by CEO (2 Minutes)

CEO or high-level executive provides statement of company support and details of corporate gift. This establishes the corporate commitment to United Way and encourages company-wide participation.

### 3. Campaign Video (5 Minutes)

Watch the campaign video to raise audience awareness and encourage them to actively support their community by giving to United Way's Community Impact Fund.

### 4. Overview of United Way (4 Minutes)

A United Way representative provides an overview of United Way and how Community Impact Fund investments are put to use. This informs the audience about the needs in this community and offers them the opportunity to participate in addressing those needs.

### 5. Testimonial or Community Impact Speaker (4 Minutes)

Hear from an employee who was helped by or benefited from a United Way initiative or from a community impact speaker about how United Way makes lasting, positive change in people's lives. This section is a real-life illustration of United Way Community Impact Fund donations in action.

### 6. The "Ask" (2 Minutes)

The Employee Campaign Chair (ECC) asks employees to complete their pledge forms, describes incentives (optional), answers questions, collects pledge forms, and thanks everyone. The ECC encourages the audience to take an active role in making northeast Florida a better place to live and work by supporting United Way's Community Impact Fund.

## The 10-minute rally

The 10-minute rally offers most features of the 20-minute rally, but with a special twist. It provides the option of using either the video or the testimonial of a service recipient or agency speaker (approximately 6 minutes).

### For a 10-minute rally:

- A. Combine steps 1 and 2
- B. Use either step 3 or 4
- C. Omit step 5, and
- D. Finish with step 6.

## Helpful Hint

Make sure to distribute 2-1-1 materials throughout your organization. 2-1-1 is a 24-hour information and referral helpline that can serve as a beneficial resource for employees.

# STEPS TO A SUCCESSFUL CAMPAIGN


## 7. Report the Results

### HERE'S HOW YOU GET STARTED

- Collect all employee pledge forms.
- Review all information for completeness, accuracy and for signatures.
- Sort all pledge forms by method of giving (i.e., payroll deduction, cash or checks) and separate them with rubber bands.

### COMPLETING THE CAMPAIGN REPORT ENVELOPE

- Sum the employee pledge forms by method of giving and record the number of givers and the total pledge amounts in the appropriate boxes. Total all dollars, pledges and number of givers.
- Separate white copies of pledge forms to be placed in the envelope for United Way.
- Submit yellow copies to your payroll department.
- Pink copies belong to the donors.
- **Confirm the total number of employees in your organization. This number will be used in computing campaign awards!**
- Print the name of the person completing the report; enter a phone number and date.
- The United Way staff person picking up the envelope will sign and date the envelope.
- Please indicate if the corporate gift is included in the Campaign Report Envelope. A corporate pledge request will be sent to your CEO. Although most companies fax back the corporate pledge, occasionally some may choose to include it with their employee results.
- Tear off the yellow copy of the Campaign Report Envelope for your records. The attached white copy is returned with the envelope to United Way.

Thank you for investing in what matters. United Way of Northeast Florida 

---

### CAMPAIGN REPORT ENVELOPE

ORGANIZATION NAME: \_\_\_\_\_

ACCOUNT NUMBER: (TO BE COMPLETED BY UNITED WAY) \_\_\_\_\_

**STEPS FOR REPORTING YOUR CAMPAIGN**  
Call United Way at 390-3200, if you have questions or need assistance.

**STEP A** Please fill in. Amounts are for the contents of this envelope only.

	NO. OF GIVERS	TOTAL PLEDGES/GIFTS
Payroll Deduction Pledges <small>(Your Payroll department keeps the yellow copy of the pledge forms.)</small>		
Contributions of Cash or Check to United Way		
Special Events Dollars	N/A	
<b>TOTAL OF THIS REPORT</b> <small>(Sum all white copies of your pledge forms to United Way.)</small>		

**STEP B** TOTAL NUMBER OF EMPLOYEES:

**STEP C** Person completing report \_\_\_\_\_ Telephone \_\_\_\_\_  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**STEP D** Received by \_\_\_\_\_ Telephone \_\_\_\_\_  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**STEP E** CORPORATE GIFT/PLEDGE FORM ENCLOSED:  YES/NO  TOTAL

**STEP F** Please call your United Way representative at 390-3200 for pick up.  
If you should have any difficulty reporting your campaign (or with any United Way form) please call us.  
You can get assistance over the phone or someone can come to your office to provide you more personal assistance.

**THANK YOU**  
P.O. Box 41428 • Jacksonville, Florida 32203-1428 • Phone: (904) 390-3200 • Fax: (904) 390-3251

**Record special event dollars on separate pledge form.**

**Sum pledge forms by method of giving.**

**Don't forget to include an accurate employee number for United Way's award program!**

### DON'T FORGET

**Keep your Community Builder or United Way staff representative advised of preliminary results as the campaign progresses and report final results as soon as they are available. Your promptness in reporting ensures that United Way has the information needed to project the dollars that will be available for allocation to our programs and to accurately recognize your organization's achievement at our Community Celebration.**

**REPORT AND POST CAMPAIGN RESULTS PUBLICLY SO EMPLOYEES CAN SEE THEIR PROGRESS!**

## 8. New Hires And Retiree Giving Programs

### A. NEW HIRES PROGRAM

Even though you have achieved your campaign goal, some of those pledges will be lost due to normal employee turnover. Meet with your organization's personnel department about implementing a New Hires Program. Being given the opportunity to contribute is a first step in demonstrating your company's commitment to social responsibility for our northeast Florida community. This year-round cultivation of new employees reduces losses due to turnover, and makes the Employee Campaign Chair's job a lot easier. Special materials are available to assist in your New Hires Program. Contact United Way for details.

#### How you can help

Here is a list of suggestions that we encourage you to implement to help make your New Hires Program successful:

- Issue New Hires pledge cards during new employee orientation and training.
- Show the United Way video during new employee orientation and training.
- Invite a United Way representative to give a brief presentation during new employee orientation and training.
- Offer pledge information to employees who are exiting the organization to encourage them to continue their pledges if they are contributors.
- Send a personal message from the organization's CEO to welcome new employees to their new jobs and provide a message of support for United Way's Community Impact Fund.

#### DON'T FORGET ...

**...United Way staff support is always available to help you continue to deliver the United Way message to new employees.**

### B. RETIREE GIVING PROGRAM

Retirees provide an excellent resource for increasing your organization's United Way campaign results. Many companies in our community already include retirees in their campaign and report generous support.

The workplace campaign is a logical vehicle for educating and updating retirees about United Way. Since many retirees contributed to United Way throughout their working years, providing them with the opportunity to stay involved and to continue giving is a natural extension of a long-standing relationship.

#### Who Benefits from Retiree Giving Program?

##### THE ORGANIZATION

- Confirms the organization's commitment to building a strong community and enhances its image as a concerned citizen by involving retirees in the effort.
- Builds retiree relations by providing a channel for communication.
- Reinforces the retiree's identification and commitment to company causes.
- Provides the opportunity to expand the base of United Way contributors.

### Helpful Hint

Materials are available for new hires and retirees. Be sure to replenish your supplies with new stock, just ask your campaigner to include them in your 2014 materials order.

### Helpful Hint

Sample letters for a variety of different needs are available on the United Way website, [www.unitedwaynefl.org](http://www.unitedwaynefl.org). Be sure to make use of these valuable tools!

# STEPS TO A SUCCESSFUL CAMPAIGN

## THE RETIREE

- Provides retirees with a trusted avenue for impacting their community through charitable contributions.
- Communicates important information about health and human services in our community.

## UNITED WAY AND OUR COMMUNITY

- Increases campaign giving to support critical initiatives that advance education, income and health.
- Provides a vehicle for communicating to retirees so that their needs can be better served.
- Broadens the base of United Way contributors.

## KEY ELEMENTS OF A SUCCESSFUL PROGRAM

*Successful retiree solicitation programs share the following common elements:*

- In the most successful solicitations, the letters are personalized. This is especially effective when the retiree is personally known by the sender.
- Information about United Way, a personalized pledge form and any special campaign materials developed by your organization are included with the letter. A return envelope ensures that gifts are returned to the correct location.
- Pension payroll deduction is offered for the retirees convenience in making a gift.
- A system is in place to track retiree contributions.
- A thank-you letter is sent to all contributors and volunteers.  
(see sample letter at [www.unitedwaynefl.org/workplace-campaigns/](http://www.unitedwaynefl.org/workplace-campaigns/)).

**TALK TO YOUR UNITED WAY RESOURCE DEVELOPMENT MANAGER FOR MORE DETAILS ON THE RETIREE GIVING PROGRAM.**

## 9. Say Thank You

Giving to United Way makes people feel good. Here are some ideas:

- Send letters of appreciation to committee members.
- Hold a thank-you event/meeting for all employees and announce campaign results.
- Consider a special thank-you event for Honor Roll and Leadership Givers.
- Send a thank-you letter from your CEO or a senior manager to all contributors.
- Feature your campaign results in an employee publication.
- Schedule a celebration for your company and invite your United Way staff to recognize your success.
- Plan to attend United Way's Campaign and Leadership Giving Celebration in spring of 2015 with your team.

## 10. Evaluate the Campaign

- Determine strengths and opportunities for improvement of your organization's campaign.
- Conduct an overall assessment/evaluation of the campaign with your team and develop a written summary for next year's ECC.

## 11. Tailor Year-Round Activities

United Way is more than just an annual campaign. Look for opportunities to provide year-round information about education, income and health. Consider promoting volunteer opportunities so that employees may see first-hand how their donations are improving lives in our community. Read about ways to keep United Way active for your employees throughout the year.

## Year-Round Activities and Communications

A year-round awareness guide can help with your campaign planning. The following can be implemented any time throughout the year:

### ACTIVITIES

- Encourage your employees to:
  - Become an AFL mentor
  - Read to 4-year olds
  - Provide financial counseling as a RealSense volunteer
  - Participate in Women in Local Leadership (WILL)
  - Join Atlantic Circle (United Way's Young Professional Society)
  - Engage with the Builders Society
  - Be part of the Resource Management Team
- Run a Loyal Contributor & Diamond Donor Campaign
- Organize a volunteer project
- Tour a United Way-funded agency

### COMMUNICATIONS

- Feature United Way stories/information in the company newsletter
- Send out United Way email messages
- Display United Way posters (variety of types and sizes)
- Distribute United Way 2-1-1 cards to employees (2-1-1 is a 24/7 information and referral service)
- Introduce new employees to United Way through the New Hires Program

### Helpful Hint

United Way's Diamond Donor Society is a recognition program for contributors that have given to any United Way for 25 years or more. United Way's Loyal Contributor Society is a recognition program for contributors that have given to any United Way for 10 years or more. A flier for both programs is available on the website, [www.unitedwaynefl.org](http://www.unitedwaynefl.org).

**For more information, please contact your Resource Development Manager or Community Builder.**

**Be sure to check [www.unitedwaynefl.org](http://www.unitedwaynefl.org) often for current news and upcoming events.**



## Community Champions

### **\*CAMPAIGN AWARDS PROGRAM\***

The following three awards are presented to four companies based on employee size: less than 100 employees; 100-500 employees; 500-1500 employees; more than 1500 employees.

#### **1. Summit Award (All Circle of Honor Organizations qualify for the Summit Awards)**

This is the highest honor presented to organizations that best exemplify the vision of United Way through their spirit, involvement and leadership during the campaign.

A minimum of two of the following criteria must be met for the organization to be considered for this award:

- Gave a corporate gift or match on employee contributions
- Increased total dollars raised from previous campaign by 5%
- Increased percent of employee participation from previous campaign by 5%
- Increased number of leadership givers from previous campaign by 5%
- Increased employee contribution to the Community Impact Fund by 5% or maintained a Community Impact Fund contribution of 80% or higher

In addition, a minimum of six criteria must be met from the following:

- Participated in Day of Caring
- Received visible support from CEO/president/manager
- Organized employee campaign meetings which were informative and educational
- Loaned or sponsored a Community Builder and/or participated as a Resource Management volunteer
- Participated in leadership giving events/meetings
- Utilized Community Impact speakers/tours
- Promoted United Way through internal communications, emphasizing the Community Impact Fund
- Hosted a special events or fundraising activities to enhance employee campaign
- Ran as a Pacesetter
- Implemented a New Hires Program

#### **2. ECC of the Year**

This award recognizes the key person orchestrating the success of the campaign and is given to an employee campaign chair that has shown exemplary commitment to United Way of Northeast Florida and our community.

At least five of the following criteria must be met to be eligible for the award:

- Attend ECC training
- Participated in Day of Action or organized year-round volunteer activity
- Attend organized United Way presentations/employee meetings
- Acquired incentives for participation in the campaign
- Promoted leadership giving programs
- Increased employee percent participation from prior year
- Increased total dollars raised from prior year
- Used innovative ideas and strategies when running a campaign

### 3. Corporate Engagement Award

The Corporate Engagement Award recognizes companies and organizations that have demonstrated excellence in volunteering and community engagement with United Way of Northeast Florida. It is based on calendar year participation.

A minimum of at least two of the following criteria must be met to be eligible for the award:

- *Participated in employee engagement or team activities through United Way of Northeast Florida throughout the year rather than just during their campaign.*
- *Significant number of employees contribute direct service volunteer time, such as Achievers For Life mentors, Born Learning workshop facilitators, ReadingPals, RealSense education counselors and volunteer tax preparers or other areas of Community Impact.*
- *Organized Days of Caring activities for their employees (Day of Caring activities are multiple simultaneous volunteer events or a series of volunteer activities completed during a specific amount of time).*
- *Partnered regularly with United Way's Volunteer and Community Engagement department to recruit volunteers (e.g. posting volunteer information on the company internet/intranet, hosting mentor recruitment drives, volunteer fairs and other events that encourage United Way volunteerism).*

### 4. Circle of Honor

The Circle of Honor recognizes companies and organizations at the level of Platinum, Gold, Silver and Bronze. At each level there are four criteria, of which two must be met to receive the award.

	Percent of Participation	Employee Per Capita	Percent of Employee Campaign Increase	Percent Employee Giving to Community Impact Fund
<b>Platinum Award</b>	80% or higher	\$250 or higher	25% or higher	90-100%
<b>Gold Award</b>	60-79%	\$150-\$249	20-24%	85-89%
<b>Silver Award</b>	40-59%	\$100-\$149	15-19%	80-84%
<b>Bronze Award</b>	35-39%	\$50-\$99	10-14%	75-79%

### 5. Million Dollar Circle

This award recognizes those companies whose long-standing support has resulted in achieving and exceeding \$1 million.

### 6. Small Business of the Year

Each year a small business is awarded the Small Business of the Year Award for their creativity, entrepreneurship, employee education and involvement in their United Way campaign.

### 7. New Campaign of the Year

Each year a new company that ran an outstanding campaign for the first time is honored. The winner is based on organizational support, level of employee participation, campaign results, internal communications, special events, showing the campaign video, running a leadership campaign, hosting a community impact or recipient speaker and volunteer participation.

# United eWay - Online Pledging

United eWay is a highly secure, proven online pledge, reporting and distribution system that provides you with more capabilities to run a successful campaign than paper pledging alone. The system allows employees to pledge their support online and campaign administrators to track results instantaneously. This flexible and customizable product offers secure transactions, real-time reporting and campaign management tools.

## UNITED EWAY MAKES IT EASY TO MOBILIZE EMPLOYEE GIVING

### PERSONALIZED DONOR EXPERIENCE

- Personalized welcome with space for endorsement letter from CEO
- Personalized reminder of last year's gift amount
- Display of thermometer graphics presenting campaign activity against goals
- Printable confirmation and acknowledgement email upon pledge

### REPORTING AND MONITORING CAPABILITIES

- Delivers real-time reports allowing you to track contributions
- Comparison of activity across groups or offices
- Target follow-up communications as needed
- Reporting and exporting features with canned formats and full customization
- Export of campaign results to populate company payroll

### HIGHLY SECURE ENVIRONMENT

United eWay Services are based on secure systems, bonded and insured, and tested and audited to meet the security standards of Fortune 500 companies. The system uses encryption technology to protect sensitive data and all servers are protected electronically and physically.

- Unique username and password given to each potential donor
- Upload of company specific pay periods and structure
- Complete e-mail capability

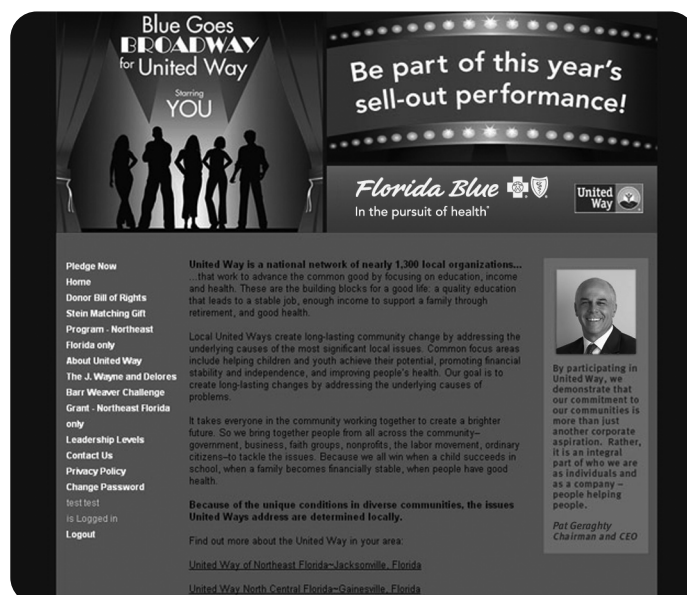
### COST EFFECTIVE

- No set-up or administrative fees
- Per transaction charges only

### PARTICIPATING UNITED EWAY COMPANIES

For a complete review of how United eWay online pledging can work for your organization contact Kim Namey at 904.390.3212 or kimk@uwnefl.org

Availity LLC	Jacksonville University
Baptist Health	Kemper Corporation
Black Knight	Landstar System, Inc.
Brooks Rehabilitation	Mayo Clinic
Ennis Pellum & Associates	Regency Centers
Enterprise Holdings	Stein Mart
Ernst & Young	UF Health Jacksonville
FIS	United Way of Northeast Florida
Florida Blue	University of North Florida
Florida East Coast Railway	US Assure
The Haskell Company	VyStar Credit Union





# LEADERSHIP

## GIVING OPPORTUNITIES



United Way  
of Northeast Florida





### United Way Leadership Circle

*Across the country, leadership giving is the fastest growing segment of most company workplace campaigns. Recent surveys suggest companies that have a leadership giving program in place experience an average 20 percent higher employee per capita giving than companies not using this technique. In the 2013 campaign, leadership giving at United Way of Northeast Florida represented nearly 50 percent of the total employee contributions. In order for United Way to create sustainable improvement in education, income and health and continue to improve lives, increasing the number of Leadership Givers in employee campaigns is essential.*

## Benefits of Leadership Giving

### Community Benefits

- Access to new resources - new dollars from leadership giving donations enhance the ability of United Way to efficiently respond to emerging community needs.
- Recognition of new community leaders - leadership donors and volunteers gain recognition for their charitable activities and are recognized as potential community leaders.
- Increased community spirit - leadership donors have increased pride in the community and desire to participate in community activities.

### Donor Benefits

- Community awareness - a formal leadership giving program incorporates ongoing communication, increases understanding and awareness of community needs.
- Positive image - leadership donors are perceived as positive role models for their peers which may increase the level of participation and total dollars raised throughout the community.
- Personal satisfaction - as a leadership donor, you are giving back to the community. You are making a difference in the lives of many people each and every day.

### Company Benefits

- Positive image - demonstrates a company-wide commitment to improving lives in our community.
- Employee performance - leadership giving activities encourage teamwork and enhance relationships by connecting employees with a shared vision and passion.
- More resources - a company's overall United Way campaign increases which means more community resources are available to help people.



### United Way Atlantic Circle

United Way Atlantic Circle is comprised of young professionals, in their 20s, 30s and 40s, who contribute \$500 or more annually and are interested in professional and philanthropic development. The group provides opportunities to volunteer with United Way partner agencies, attend professional development seminars and enjoy networking events. Atlantic Circle's volunteer efforts support United Way's education initiative to keep students on track to graduation. Members also have the special opportunity to participate in a multi-generational mentoring project known as the Stein Fellowship.



### United Way Women in Local Leadership

United Way Women in Local Leadership (WILL), made up of women who contribute \$1,000 or more annually, was founded by a group of corporate, civic and community leaders who work together to create significant and permanent improvements in people's lives. WILL members' volunteer efforts support United Way's education initiatives of school readiness and quality early learning. WILL also provides opportunities to network with other women through a mutual commitment and relationship with United Way.

**Leadership Giving is the opportunity for contributors to maximize their gifts' impact on our community. Contributions at leadership levels will go a long way toward making lasting and sustainable changes in people's lives. Anyone can become a leadership donor at any income level through the Honor Roll level of giving.**

LEADERSHIP CIRCLE GIVING LEVELS	
Honor Roll	See chart below
Silver Circle	\$1,000 - \$2,499
Gold Circle	\$2,500 - \$4,999
Platinum Circle	\$5,000 - \$9,999
Tocqueville Society	\$10,000 and above

The chart below outlines the Honor Roll level of Leadership Giving. Please check the Giving Guide below to see if your employee's gift is within the ranges listed for his/her salary bracket.

HONOR ROLL LEADERSHIP GIVING GUIDE						
IF YOU EARN THIS:			PLEASE CONSIDER A PLEDGE OF THIS:			
Annual Income	or	Hourly Income	% of Income	Every Week	Every Other Week	Twice a Month
\$8,840 - \$9,999		\$4.25 - \$4.81	0.60%	\$1.02 - \$1.15	\$2.04 - \$2.31	\$2.21 - \$2.50
\$10,000 - \$19,999		\$4.82 - \$9.61	1.00%	\$1.92 - \$3.85	\$3.85 - \$7.69	\$4.17 - \$8.33
\$20,000 - \$29,999		\$9.62 - \$14.42	1.50%	\$5.77 - \$8.65	\$11.54 - \$17.31	\$12.50 - \$18.75
\$30,000 - \$39,999		\$14.43 - \$19.23	1.75%	\$10.10 - \$13.46	\$20.19 - \$26.92	\$21.88 - \$29.17
\$40,000 - \$49,999		\$19.24 - \$24.04	2.00%	\$15.38 - \$19.23	\$30.77 - \$38.46	\$33.33 - \$41.66
\$50,000+		\$24.04+	2.00%*	*All gifts of this amount or more qualify for leadership giving. Please see Leadership Circle Giving Levels chart.		

## The Stein Matching Gift Program

The Stein Matching Gift Program encourages young professionals to incorporate philanthropy in their personal and professional lives through a four-year step-up giving program.

An individual makes a first time gift of \$500, or increases their current gift to \$500, directed to United Way's Community Impact Fund or education area. This gift will then be matched by the Stein Matching Gift program, making the donor a member of United Way's Leadership Circle at the Silver level of giving. Over the next three years, the donor increases their personal gift to reach \$1,000 (Silver Circle).

A current leadership donor (\$1,000 a year or more) who increases his/her gift a minimum of 10 percent to the Community Impact Fund or education area will receive a dollar-for-dollar match of the increase. The young professional will then be recognized at the combined level of giving in United Way's Leadership Circle.

## Did you know...?

A gift to the Community Impact Fund can yield measurable improvement in early childhood success, the academic achievement of students, and the independence and quality of life for seniors.

**A \$1,000 gift provides one of the following services:**

- Healthy childbirth education to 22 high-risk, low-income mothers
- Counseling and support for two children who have been abused
- One month of home-delivered meals to six frail seniors

**A \$5,000 gift provides one of the following services:**

- Quality preschool for five homeless children
- Mentoring, tutoring and counseling to keep ten at-risk students from dropping out of school
- Elimination of the waiting list for home delivered meals for frail seniors for three months

**A \$10,000 gift provides one of the following services:**

- Teacher training and the purchase of materials and equipment to increase the quality rating of an early learning center serving low income children
- One year of specialized academic, cultural and social education to help a child at risk of dropping out of school graduate on time
- One year of intergenerational, therapeutic care for a frail senior preventing nursing home placement at a cost of \$60,000 per year



## United Way Tocqueville Society



In the past 25 years, Tocqueville Society members have raised more than \$50 million, demonstrating what collective community impact can achieve. Our members understand the importance of creating long term change that helps people help themselves – ensuring the success of the generations that follow.

Tocqueville Society members commit to an annual gift of \$10,000 or more. Members unite with fellow community leaders and corporate professionals at events throughout the year. This substantial commitment plays a vital role in building a better community for all.

## The J. Wayne and Delores Barr Weaver Challenge Grant

The Weaver Challenge allows an individual to join the Tocqueville Society with a contribution of \$6,500 and inspires current members to strive for higher levels of giving. Matching opportunities are also available for young professionals joining the Tocqueville Society with a gift of \$5,000.

- An individual who pledges \$6,500 in the first year will be matched by an additional \$3,500 in that person's name, making the donor a member of the Tocqueville Society.
- The second year, the donor agrees to contribute \$7,500 and the grant gives \$2,500.
- The third year, the donor agrees to contribute \$8,500 and the grant gives \$1,500.
- In the fourth year, the donor pledges to personally contribute \$10,000.

**The Society Challenge** allows a Tocqueville member to join the Ordre de Liberté (\$25,000-\$49,000) level with a contribution of \$15,000. The donor makes a five-year commitment to increase this gift to the \$25,000 level of giving. They commit to a gift of \$15,000 the first year, \$17,500 the second, \$20,000 the third, and \$22,500 the fourth year, with the balance from \$25,000 provided each year by the challenge. The fifth and final year the donor personally contributes \$25,000.

## Loyal Donors and Diamond Donors

United Way of Northeast Florida recognizes and celebrates loyal donors who have supported United Way for 10 years or longer, and in doing so, have impacted the lives of First Coast families. Through dedication and continuous giving, these individuals demonstrate leadership by emphasizing their commitment to United Way's vision of building a stronger, healthier community. Their long term support of United Way has allowed us to address the most critical needs in our community.

Individuals or couples who have been giving to United Way, in any community, for 25 years or more are recognized as Diamond Donors. Those that have been giving to United Way in any community for 10 years or more are recognized as Loyal Donors.

Research shows that people who have consistently contributed tend to give more to the annual campaign.

### **Consider the following activities and methods to retain those who commit to donating every year:**

- Encourage Loyal Donor recognition in existing events
- Spotlight Loyal Donor articles for company newsletters
- Encourage recognition at company kick-off meetings
- Look for a volunteer Loyal Donor chair to organize engagement efforts
- Encourage employees to self-identify on United Way's pledge form or on eWay

## United Way's Builders Society

United Way of Northeast Florida welcomes a new affinity group during the 2014 Campaign. The Builders Society engages Gold & Platinum Level Leadership Society members who contribute an annual gift of \$2,500 or more. Membership is automatic based on your campaign contribution so no opt-in is necessary.

The Builders Society provides exclusive networking opportunity with like-minded community leaders starting with their kickoff party in the fall. Members will also have the ability to attend a limited luncheon series hosted by a Tocqueville Society member and take part in a community outreach project designed to supply parents and caregivers with learning opportunities for their children.

# FUN

## IN FUNDRAISING

Did you know campaign themes capture an individual's attention, build enthusiasm and personalized your campaign message so it is meaningful to your employees? Contests bring out employees' competitive side and boost their enthusiasm for your campaign. Find some great ideas for themes and activities in this section.



United Way  
of Northeast Florida

## FUN IN FUNDRAISING

### *Chili Time!*

**Nassau County Government** held a chili cookoff to raise money for United Way. Nassau County Commissioners and campaign staff were judges for the chili entered. It was a very scientific taste test and lots of fun!

### *Get in the Game for United Way*

**Florida Blue** shared board game fun and inspired giving with their Get in the Game theme. A campaign rally included a game United Way BINGO and a pair of giant added décor to the leadership event. Incentives and promotional items were game themed as well.

### *Boot Scoot and Boogie!*

**Rayonier** held a “Raydeo” rally at Mavericks. Their employees also participated in a good ol’fashioned chili cookoff.

### *Rockin’ and Rolling with Unitea Way!*

**JEA** had a rockin’ good time as they celebrated their campaign. Whether “Grease-lightning” or “Twist and Shout...” they brought employees together to thank them for their participation.

### *Play Ball!*

**Vistakon** and **JEA** (along with some of JEA’s partners) worked with local agencies to build a school baseball field as part of Vistakon’s Days of Caring. Here they’re shown reaping the benefits of their labor!

### *Superheroes*

**VyStar Credit Union** invited all of their employees to be super heroes for United Way; combatting community challenges in education, income and health!

### *Jaguars Pride!*

**The Haskell Company** invited all of their employees to be super heroes for United Way; combatting community challenges in education, income and health!

### Campaign Theme Ideas

- 50's, 60's, 70's, 80's, 90's
- A Night at the Casino
- American Idol
- Be a Lifesaver
- Circus
- Disco
- Family Feud
- Football
- Hoedown
- Holiday
- Island Luau
- Iron Chef
- Karaoke
- Mardi Gras
- Medieval Times
- Monopoly
- New York! New York!
- Olympics
- Picnic
- Pirates
- Project Runway
- Scavenger Hunt
- Seasons
- Survivor
- Wild West

**We want to see your Fun in Fundraising ideas!**  
Please email your campaign theme and photos to [kelseym2@uwnfl.org](mailto:kelseym2@uwnfl.org).

## **Fundraising Activity Ideas**

### **Balloon or Candy Gram**

Sell and deliver candy or balloons with attached notes between employees. Employees get affirmation and the office gets decorated with colorful balloons or people can enjoy candy treats.

### **CEO Car Wash**

Employees donate \$5 to have their car washed during their lunch break by their bosses. Management can donate car wash supplies.

### **Executive Auction**

Get the executive staff to donate one hour of their day to your campaign and auction off each executive to the highest bidding employee. The executives then must take over the employee's job for one hour.

### **50 & 50 Raffle**

Employees each donate a dollar to be kept in a plastic container. Hold a drawing where the winner receives half of the funds in the container and your United Way campaign receives the other half.

### **Jeans Day**

Each employee who participates or gives at a certain level is entitled to wear jeans on the day of their choice. They can earn extra days for adding on to their donation.

### **Late Meeting Fee**

Employees who arrive late for meetings pay a nominal fee of 25 cents each meeting in a jar for the campaign.

### **Lunch Box Auction**

Employees supply lunches to be auctioned with encouragement to the CEO and management staff to help provide them. You can also give prizes for the most creative, nutritional, elegant and humorous lunches.

### **Picture Match Game**

Invite employees to match baby photos to management. The employee with the most matches receives a fun incentive.