

United Way  
of Jackson County

**INSPIRE ACTION.**  
**MAKE A CONNECTION.**  
GIVE IT YOUR BEST SHOT.  
**BUILD A BETTER  
COMMUNITY NOW.**  
GIVE. ADVOCATE. VOLUNTEER

**LIVE UNITED™** 

[UnitedWayofJacksoncounty.org](http://UnitedWayofJacksoncounty.org)

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 [United Way of Jackson County group](https://www.facebook.com/UnitedWayofJacksonCounty)



Launch the best campaign  
your company has ever seen.  
**Look inside to find out how.**

# 2010 Campaign Guide

## UNITED WAY OF JACKSON COUNTY MISSION

To improve lives by mobilizing the caring power of Jackson County communities.

### VISION

We will build a stronger Jackson County by mobilizing our communities to improve people's lives. To do this, we will:

- Energize and inspire people to make a difference.
- Craft human care goals within and across Jackson County.  
Build coalitions around these goals.
- Increase investments in these goals by expanding and diversifying our own development efforts and supporting those of others.
- Ensure that these investments have measurable, recognizable impact.
- Reflect the diversity of communities we serve.

### VALUES & BELIEFS

- Community : We bring together our diverse population to discover and deliver solutions to the challenges which impact the health and well being of all of us.
- Compassion: We offer opportunity, encouragement and inspiration within our community to care for one another.
- Empowerment: We provide the ability to grow, collaborate and transform for individuals, organizations and communities.
- Vision: We help people fulfill their potential and improve lives in our community by informing, advocating, convening and facilitating human services.
- Integrity: We are honest and trustworthy providing clarity, consistency and strength in our mission.

### CALENDAR

Campaign Kick-off and Loaned Executive Training.....	September 10
Weekly lunches at Medford Red Lion start.....	September 17
Last weekly lunch.....	November 12
Open House and campaign envelope drop off.....	November 18
Campaign Thank You Celebration at Medford Red Lion.....	November 19

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# Welcome!

Thank you for taking the lead in your company's campaign this year. What you do here will send a ripple effect into our community bringing lasting change. No one can do it alone. With your help and the help of hundreds of others in our community who are bringing the United Way campaign into local workplaces, we can make an impact that will advance the common good, giving us all a better place to live.

**Thank you!**

## Overview of Your Company Campaign

While every company campaign is different based on the culture and needs of the company, there are some basic elements that many successful campaigns follow:

1. First meet with your Loaned Executive, a United Way volunteer who will help you understand how a campaign works, plan your campaign, and deliver supplies like pledge forms, brochures and posters to you. Your campaign plan will include beginning and end dates, kick-off, presentations, events, and a plan to thank participants.
2. Talk to your top management for approval of your plan and ask for their involvement and support of your campaign. Some will write a letter of support, speak at the kick-off and events, and even participate in some of the fun.
3. Select a goal based on what you know about your company's past giving and current circumstances. Your Loaned Executive will have information on your company giving history and can help you decide on a realistic and challenging goal. It could be set based on total raised, percent of people who participate, or the average gift in your company.
4. Bring your group together to kick off your campaign. Have someone come in to make a presentation about changes happening in our community because of contributions and support of United Way through individual and corporate gifts. Your Loaned Executive can help you find the right person to come in and speak to your group. You can distribute pledge forms and brochures at the kick-off and have some fun in the process. Talk to your Loaned Executive or look further into this guide if you'd like more ideas.
5. Whether everyone can attend a kick-off meeting or presentation or other event you plan, make sure that 100% of the employees in your company get the opportunity to give.
6. Make sure the campaign is visible to everyone who works with you - use bulletin boards, company newsletters, intranet, email, posters to get the message of the campaign, its results, and thanks at the end out for everyone to see.
7. Tell everyone what the results of your fundraising efforts are - United Way can also provide the real results being achieved with contributions over the coming year - just ask your Loaned Executive to be added to the United Way campaign results contact list.
8. Thank your co-workers for their participation! United Way provides "LIVE UNITED" pins, and certificates and awards for outstanding participation. You might also want to find a way to personally thank them - like a chocolate candy kiss, a thank-you note, or just stop by to say thanks face to face.
9. Follow up by getting the white copies of pledge forms to your payroll office to set up payroll deductions; the yellow copies into the report envelope and to United Way by calling your Loaned Executive or United Way (773-5339); and the pink copy is kept by the person giving the donation for their IRS documentation (along with their supporting W2 at the end of the year for payroll deduction giving).

**Continue reading for more ideas and information.**

**Use the handy checklist on the back for tracking your steps.**

**Contact us at 541-773-5339 or [office@unitedwayofjacksoncounty.org](mailto:office@unitedwayofjacksoncounty.org)**

# Eight Steps to the Successful Campaign...

1. Meet with your Loaned Executive.
2. Involve your top management.
3. Develop a plan for reaching your company goal.
4. Begin with a group approach.
5. Make sure that 100% of fellow employees have an opportunity to give.
6. Promote your campaign.
7. Announce the results in your workplace.
8. Thank everyone who helps and everyone who gives.

## 1. Meet with your Loaned Executive:

Every United Way campaign has a Loaned Executive (LE). This volunteer is loaned by a local business to help you plan, organize and conduct your campaign successfully. Your LE is available to answer your questions, provide the materials you need, and to keep you connected with United Way. And, if you have any questions for United Way staff, please feel free to call us at 773-5339.

You should receive a call from your Loaned Executive before the end of September . If you haven't heard from them or want to start your campaign earlier, please contact the United Way office directly at 773-5339 or email us at [office@unitedwayofjacksoncounty.org](mailto:office@unitedwayofjacksoncounty.org), or visit our website at [www.unitedwayofjacksoncounty.org](http://www.unitedwayofjacksoncounty.org).

The campaign season for United Way is mid-September through mid-November. If you want your company campaign to align with it, you may choose to run it anytime during that time period. We suggest that it run not longer than a two week period so that you can keep the momentum going.

## 2. Non Coercion Policy:

We believe that voluntary giving embodies the spirit of giving we promote. All donations should be given freely and without pressure of any kind. Coercion in any form is unacceptable.

## 3. Involve Your Top Management:

- Support from your top management is hugely important to campaign success, lending approval and leadership to all the activities of your campaign.
- If you have more than 20 employees at your work, ask your management to help choose key employees to form a campaign team.
- Ask for approval of company time for education and motivation through agency tours, presentations, and employee rallies so that the people you work with have a chance to hear real stories of the results of giving through United Way.
- Ask top management to give a boost to your campaign by sending letters out explaining why the company chooses to provide the opportunity to give through payroll deduction (most participating companies do provide the payroll deduction option).
- Involve management in a leadership giving (\$500+ giving) campaign. Ask top management to assign one of their peers to serve as a leadership chair for the Mt. McLoughlin Society for individual giving to conduct a campaign for leadership level giving prior to your campaign kick-off. Then announce the results at your kick-off event. Challenge fellow employees to top the total leadership giving results.
- Ask top management to play important roles in your kick-off, rallies and other activities.
- Always remember United Way's anti-coersion policy; employees should never feel pressured to give. Coersion is unacceptable in any form.

## 4. Develop Your Campaign Plan For Achieving Your Company Goal:

Select key people to join your campaign team. Be sure to include people who have demonstrated support in the past as well as your Loaned Executive. Begin planning before the campaign.

- Plan for it to run two to four weeks. Longer campaigns may begin to lose momentum. Try to complete the campaign by the end of October or early November.
- Prepare a calendar of events and activities. Assign specific responsibilities and completion dates.
- Set goals based on past employee giving and specific circumstances of your company to provide motivation and a sense of accomplishment.
- Plan a kick-off to set the tone for the entire campaign.
- Schedule additional employee meetings and other events. Publicize plans well in advance through the employee newsletter, bulletin boards, intercom or other communication systems you have available to you.
- Personalize each pledge card with the employee's information. If you use stickers, remember to place them on all three copies of the pledge forms.
- Make a plan to ensure that each employee is personally given the opportunity to contribute.
- Attend one of United Way's training programs for In-House Campaign Chairs make arrangements by calling United Way at 773-5339 or emailing [office@unitedwayofjacksoncounty.org](mailto:office@unitedwayofjacksoncounty.org)
- A training at your facility for in-house chairs can be arranged by calling the United Way office and speaking to the Workplace Campaign Director.

## 5. Begin with the Group Approach:

You will reach a wide audience with a consistent message at one time with a group kick-off.

It also saves company time and resources and you can wrap up your campaign faster. Meetings are scheduled to fit company needs - often a rally or presentation can be part of an already existing meeting or company event.

Make your kick-off upbeat, informative and short -- 20 minutes. Your top management, Loaned Executive, a United Way speaker, and fellow employees should all be invited to attend.

- Distribute pledge forms and brochures.
- People will give to support the things that they believe in. Chances are that United Way funds support a service that your fellow employees believe in. There is no need to apply pressure to give - simply provide the opportunity. You might say something like, "When you support United Way, your money makes a difference. United Way improves lives here, where we live. It's these programs and services that make our whole community healthier, safer, and stronger. United Way plays a key role in making them possible. Your commitment to give ensures help is there when people need it. If you choose to give through United Way, please make your pledge now."

### Sample Agenda for Your Campaign Kick-off

2 minutes	Opening Remarks by Top Management
2 minutes	Brief Remarks by YOU, the In-House Campaign Chair
8 minutes	Presentation by United Way or agency representative
5 minutes	Questions and answers
3 minutes	Distribute pledge forms and brochures and ask for pledges to be signed

## 6. Follow Through - Assure 100% are Given the Opportunity to Participate:

Begin personal follow-up with anyone unable to attend within one week of the kick-off.

Ensure that 100% of employees are provided the opportunity to give.

Utilize your company's technology to keep the campaign alive and upbeat. Use group bulletin boards, e-mails, voice mail, etc.

If your company has a group of employees that work in the field or for some other reason don't traditionally participate in your campaign, try enlisting the help of someone inside their department to bring them the opportunity to give.

## 7. Promote Your Campaign:

Promoting your campaign means increasing awareness, creating team spirit, and updating your organization on the progress of the campaign. Special events, contests and drawings can also add pizzazz and fun to your campaign as well as encourage giving. See the Fun Ideas section in this guide. Be creative, use your imagination, have fun! Tell us about your successes so we can tell others!

## 8. Say Thanks:

- Announce your results publicly.
- Write individual thank you notes.
- Publish thank you messages in employee newsletters and post them on bulletin boards.
- Distribute United Way pins or stickers to donors.
- Thank your top management, guest speakers and prize donors.
- Thank everyone through payroll check insertions.
- Ask kids from any United Way agency to write thank you notes.
- Attend United Way's Campaign Thank You Celebration in November.

## 9. Report Your Campaign Results to United Way:

Finally, it will be time to finish your campaign. Here are the details to make it easier:

- Make sure the employee name is legible on all copies of the pledge card.
- Forward white pledge card copies to your payroll office.
- Place yellow copies of cards in your Campaign Report Envelope.
- Return pink copies to the employee donor.
- Complete the information on the front and back of the Campaign Report Envelope and if needed,

correct/update the information United Way has printed. Attend a campaign weekly report, give your envelope to your Loaned Executive, or return it to the United Way office in person. Please do not mail Report Envelopes. You can call the United Way office if you would like a staff member to pick up your envelope - 773-5339.

Even if your campaign results are sent to another location of your organization, United Way still needs to know your results so that your company can be recognized for its achievements in the campaign. Talk with your management and Loaned Executive to determine the best way for you to do this.

# Pledge Cards and Report Envelopes

## Pledge Cards:

- Personalize them for all employees. Remember, if you are using labels, you will most likely want to label all three copies. Make sure the name is legible on all three copies.
- Pledge forms must be signed for payroll deduction, electronic funds transfer, billing, and credit/debit card gifts.
- Donors must indicate if they DO NOT want their gift acknowledged by the agency they designate. Without request for acknowledgment their name, amount of their gift and contact information WILL be given to the agencies.

## IRS REQUIREMENT FOR DOCUMENTING CHARITABLE DEDUCTIONS

Donors are required to provide something (such as the pink copy of the pledge form, a letter, or other proof of donation) with United Way's name on it, with their W2 showing the amount of payroll deduction, if they wish to claim it regardless of the amount, as a deduction on their taxes. For cash donations bank records plus the pink copy will satisfy the IRS requirement. The IRS has not ruled on the details of this new law and United Way of Jackson County, Inc. stresses that this information IS NOT TAX ADVICE. It is provided for information only.

## Campaign Report Envelopes:

- If you use the United Way pledge form, all yellow copies of the form must be included in the envelope.
- Be sure the envelope reflects only the total of information inside. Do not mark a running total of reports you have already filed.
- Sign the envelope and turn it in at a campaign weekly report lunch, to your Loaned Executive or to the United Way office. Please do not mail your campaign report envelope.
- Call the United Way office if you need someone to pick up your envelope 773-5339.

# Making the Most of Campaign Activities

## Kick-off Ideas:

- Develop your own campaign theme.
- Plan a lunch or breakfast event, where the top management are cooks.
- Have a company barbecue.

## Employee Meetings:

- Hold rallies on company time, with the permission of management.
- Invite top management to speak and promote the campaign.
- Provide refreshments.
- Publicize guest speakers.
- Have a drawing for a prize (company shirt, cap, time off, parking space, etc.).
- Take your meeting to the employees. Try holding it in the middle of the work area if possible.
- Combine United Way with a regularly scheduled meeting.

## Publicize Your Campaign:

- Have agencies put together a collage or other display.
- Have literature available on United Way and its agencies.
- Publish an article in your company's newsletter about the campaign (ask United Way staff if you would like assistance in writing the article).
  - Hang United Way posters and a thermometer with your goal.
  - Have a large jar of jelly beans, sunflower seeds, etc. and have employees guess how many are inside. At the end of your campaign, give it as the prize to the person with the closest guess. To guess, an employee could make a small cash donation.
    - Wear your United Way pin and encourage other donors to wear theirs.
    - Use your company's technology -- e-mail or voice mail group messages.

## Special Events:

- Tour a nearby agency -- we're sure you're close to one. Invite interested employees to go on the field trip.
- Going, going, gone. Hold an auction of donated foods, crafts, art by employees with proceeds going to United Way.
- Have a slogan contest just prior to kick-off.
- Boogie for Dollars. Throw a dance-a-thon. Have an entrance fee and dancers have pledges for dancing.
- Victory Celebration. Have a victory party at the campaign closing announcement.

## Contests:

- Ugly tie, earrings, or hat. Ask employees to wear their ugliest. To vote, charge a small cash donation. The person with the most votes wins a prize at the end of the day.
- Kiss the Pig Contest: Have employees sponsor management representatives as contest participants by making small cash donations. Employees who have the most money donated in their names have to kiss a live pig at campaign rally.
  - Match the Baby Face. Have people bring in a baby photo. Employees buy ballots and the one with most correct matches wins a prize.

## Sporting Events:

- Fun Run. Charge an entry fee and provide a prize for the winner.

- **Tricycle Races.** Before the race, employees pay to have sandbags tied to opposing departments' tricycles. Hold the race in the lunchroom or outside. The first one to cross the finish line wins a prize provided by the other departments.
- **Office Olympics.** Set up an obstacle course in the lunchroom, offices or outside. Use one station for typing a few paragraphs, another for filing, another for photocopying, etc. Contestants pay an entry fee and the winner gets a prize.
- **Team Sports.** Form department teams and play trash basketball. Provide refreshments.
- **Treasure Hunt.** Sell daily clues to a mystery location where a "treasure" is hidden. The first employee to get there wins the prize.
- **Dunk Tank.** Set up a dunk tank and sell tickets to dunk managers. Charge \$1 per dunk.
- **Putting contest.** Have a competition with the employees against the executives.
- **Miniature golf course** through your office using cups for holes, shredded paper for sand traps and blue cellophane for water hazards.

#### Other Ideas:

- **Dress Down for United Way.** Have employees pay \$1 per day to dress casual during the campaign.
- **Executive Car Wash.** Employees pay top management to hand wash their cars during the workday.
- **Employee Book Sale.** Have employees donate old books, videos, cassettes, etc. for sale to benefit United Way.
- Have a weekly drawing during your campaign. Entries are given automatically to those who have completed their pledge card -- even if they can't donate.
- **Executive Fantasy Auction.** Employees get to bid on activities the executive's agree to do: cooking the winner dinner, singing at an employee event, mowing the winner's lawn, washing the winner's car, shaving a beard or head, etc.
- Collect recipes and helpful household hints into a cookbook for sale. Have a sample tasting event.
- **Scavenger hunt** - teams of four pay entry fee. Points are awarded for each item and winners rewarded.

#### Prizes and Incentives:

- Approach company vendors for donations. You'll be surprised how easy they are to get.
- Ask your top management to donate a couple of half days off, or even a whole day, with pay.
- Raffle company shirts, caps, cups, etc.
- Ask your top management for the use of a special reserved parking space as a reward.

#### Peer to Peer Solicitations For larger organizations

Personalize your campaign. Peer-to-peer solicitations are one-on-one conversations that educate employees about United Way's impact in the community. This helps to create a dialogue about United Way and gives employees an opportunity to ask questions or voice comments. This type of personalization makes United Way and your campaign more meaningful.

## Solicitor 101 for In-house Chairs

- To put your fellow employees at ease, come up with a special name to call your solicitors, such as in-house campaign team member.
- Recruit solicitors before your campaign so that they can be trained before information is distributed.

- Recruit one solicitor for every 10 to 20 employees to ensure solicitor isn't overwhelmed with work.
- Recruit solicitors from all lines, levels and locations of your company.
- Solicitors lead by example. Ask your solicitors to complete their United Way pledge forms before they ask fellow employees for support.
  - Give solicitors the opportunity to take an agency tour, participate in a Day of Caring volunteer project, or listen to an agency speaker, or call the United Way office to schedule a tour of one of our agencies. (773-5339) This will help provide a real experience for solicitors to speak from.
  - Ensure solicitors are well informed about the logistics of your campaign such as the campaign goal and timeframe, employees to solicit, when and where they will receive materials, when and where pledge forms should be returned, etc.
  - Make sure solicitors are thanked and feel appreciated for their efforts. Try a personalized letter from the CEO, a handwritten thank you from you, or recognition in your company newsletter or on a bulletin board.

## Recruiting Solicitors

- Recruit employees who are supportive of United Way. A good indicator is if they gave to United Way last year.
  - Recruit employees who have participated in a Day of Caring volunteer project or volunteered for a United Way funded agency or have a friend or family member who has used United Way services.
    - If potential solicitors feel uncomfortable about the idea of "soliciting" their peers, assure them that their goals are to educate employees about United Way's impact in the community and is really meant to simply provide them with an opportunity to support our community - without pressure from you.
    - Remind potential solicitors that giving to United Way is a personal and a voluntary decision. Be sure to clearly inform them of United Way's Anti Coercion Policy: We believe that voluntary giving embodies the spirit of giving we promote. All donations should be given freely and without pressure of any kind. Coercion in any form is unacceptable.
    - Provide incentives for solicitors, such as the first one to solicit their assigned employees will get a special prize or privilege, such as parking in a special parking space.

## Company Awards and Public Recognition

There are several awards available to all companies that participate in the United Way campaign. Awards are given based on per capita increases in giving and overall campaign performance. Per capita giving is measured by dividing the total annual employee pledge by the total number of employees within your organization.

### Campaign Achievement Awards:

- Gold Awards -- Gold Awards are given to campaigns that give at two times the national per capita for their industry group.
  - Silver Awards -- Silver Awards are given to campaigns that give at one and one-half times the national per capita for their industry group.
  - Bronze Awards -- Bronze Awards are given to campaigns that give at the national per capita level for their industry group.

### Community Spirit Award:

The Community Spirit Award is given to the one company with the highest per capita giving in the entire community.

### Sweet Sixteen

The top 16 companies for total dollars raised.

### Fab Fifteen

The top 15 companies based on percent increase over previous years.

### School Awards

Based on per capita giving , an award for the top high school, middle school and elementary school.

### 10 Plus

Based on a 10% or more increase over the previous year.

### Welcome and Welcome Back

Special award for first time campaigns or for renewing campaigns after a year or more without a campaign.

### Matchmakers

Companies that match employee gifts. Companies qualify by matching at any ratio, for example \$.50 to each \$1.00 donated by employees. Some companies do a dollar for dollar match.

## Individual Giving Leadership Recognition

### Mount McLoughlin

#### Individual Leadership Giving Society

Table Rock	\$500 to \$999
Roxy Ann Peak	\$1,000 to \$2,499
Wagner Butte	\$2,500 to \$4,999
Mt. Ashland	\$5,000 to \$9,999
Toqueville	\$10,000+



# In-House Chair Campaign Checklist

Activity            Date /Completed/Comments

Meet with Loaned Executive \_\_\_\_\_

## Management

Management support \_\_\_\_\_

Management Leadership campaign \_\_\_\_\_

Management endorsement letter \_\_\_\_\_

## Develop the Plan

Team selection \_\_\_\_\_

Set goal \_\_\_\_\_

Select key people \_\_\_\_\_

Schedule Trainings \_\_\_\_\_

Schedule Kick-off activities \_\_\_\_\_

Recruit your presenter \_\_\_\_\_

Schedule Special events \_\_\_\_\_

Run the campaign \_\_\_\_\_

Personalize pledge cards \_\_\_\_\_

Put on your events \_\_\_\_\_

Distribute materials \_\_\_\_\_

Track results & publicize \_\_\_\_\_

Follow-up with employees \_\_\_\_\_

Submit pledges to payroll & United Way \_\_\_\_\_

## Say Thank you

Announce your results publicly \_\_\_\_\_

Thank participants \_\_\_\_\_

Attend Thank You Celebration \_\_\_\_\_

Report your successes to United Way of Jackson County. Return a copy of this page to your LE.

The ideas section is based on successful events that help others run campaigns. Your input will be useful for others. Please share!

Congratulations! And Thank You!