



**2008**

**Workplace Campaign Coordinator**

**Planning Guide**

**LIVE UNITED™**

# Welcome!

September 11, 2008

Dear Workplace Campaign Coordinator,

Thank you for volunteering to lead this year's United Way Campaign effort in your workplace. Your role as a Workplace Campaign Coordinator is crucial to the success of our United Way's Campaign in Jefferson & North Walworth Counties. Each of you was handpicked for this role because your company has full confidence in your leadership ability.

As a result of past efforts by Workplace Campaign Coordinators, United Way has been able to address these community priorities:

## Improve Community Health

- Supporting healthcare access for uninsured and underinsured individuals
- Supporting mental health services for those in need
- Supporting those in recovery for a better tomorrow

## Address the Needs of At Risk Youth

- Expanding after-school options for children
- Providing youth mentoring opportunities

## Strengthen Families

- Preparing children for school
- Providing relief to those in abusive situations

## Build & Maintain Family Financial Stability

- Providing a safety net in case of disaster
- ✓ Putting people back to work

## Integrate Diverse Populations

- Providing resources & opportunities for English Language Learners
- Providing Information & Referral to those in need

In 2007 our United Way's partner agencies touched the lives of over 14,000 people, nearly 1 out of every 4 residents in our service area. Any man, woman or child – regardless of age, skin color or ability to pay was afforded the opportunity to improve their life by working with a United Way partner agency, and workplace campaigns made this happen. Thank you!

You are about to begin a challenging, yet fun and rewarding experience. Please take advantage of all the information and resources available to you and you will have a successful workplace campaign.

Thank you for investing in what matters; community, working together and results.

Sincerely,

Barb LeDuc  
Workplace Campaign Co-Chair

Frank Wichmann  
Workplace Campaign Co-Chair

Dan McCrea  
United Way Executive Director

*P.S. We are very excited about the new donor sweepstakes FUEL FOR A YEAR underwritten by Frawley Oil Company, Fort HealthCare and Jones Dairy Farm. Information about the sweepstakes is available at [www.ourunitedway.com](http://www.ourunitedway.com).*

# STEP 1: Learn About Our United Way

## MISSION

The mission of the United Way of Jefferson & North Walworth Counties is to efficiently raise and allocate funds through volunteer efforts, and to assist meeting identified health and human service needs throughout the communities we serve.

## OUR UNITED WAY

Our United Way is right here, in our community. The United Way of Jefferson & North Walworth Counties is an independent, non-profit organization that has been helping to meet the needs of residents of Jefferson and North Walworth Counties since 1943. Our United Way is governed by a community based, volunteer board of directors who set the organization's strategic direction and oversee the operations of our United Way.

### 2008 Board of Directors

Rob Abbott  
Principal  
Fort Atkinson School District

Diane Niemeyer  
Marketing Director  
Daily Jefferson County Union

Vance Dalzin, Ed.  
Principal  
Whitewater Unified School District

J. Michael Phelps  
Consulting  
Fort Atkinson

Kristin Giblin  
HUSCO  
Whitewater

Paul Plinske, Ph.D  
Director, Intercollegiate Athletics  
UW - Whitewater

Jeff Johnson  
President  
Badger Bank  
Fort Atkinson

Staci Schoenrock  
Collections Officer  
Fort Community Credit Union

Jill Kessenich  
Clark House Design  
Fort Atkinson

Michael Wallace  
President/CEO  
Fort HealthCare

Carol Ward Knox  
Jefferson

Terry Wenzel  
Traffic Manager  
Jones Dairy Farm

## WHO WE ARE

The United Way of Jefferson & North Walworth Counties is a local, independent non-profit organization run by a volunteer board of directors from all segments of our community. Our United Way addresses local needs by leading community partnerships and by providing funds for services.

We are LOCAL – Partner agencies of our United Way help right here in Jefferson and North Walworth Counties.

We are EFFECTIVE – Donations help those who need it most.

We are ACCOUNTABLE – Member agencies meet high quality standards.

We are RESPONSIVE – Our United Way responds to priority community issues.

## WHAT OUR UNITED WAY DOES

**We Unite People in Giving** by offering a consolidated campaign – The United Way concept is that together, we can make a bigger impact in our community. United Way multiplies your gift until you are doing more than you thought possible!

**We Change Lives** through the services of the 30 agencies we support.

**We Operate First Call for Help and Information.** With assistance from the Doris M. Highsmith Trust, United Way operates this information and referral service.

Call us at 920.563.9555 or 1.800.879.1918.

**We Coordinate Fort Atkinson's FISH Program,** a service that links volunteer drivers with individuals that need transportation to and from a medical appointment. FISH volunteer drivers drive as far away as Madison and Milwaukee and are reimbursed for their mileage.

## ABOUT OUR UNITED WAY'S ANNUAL CAMPAIGN

Our local United Way conducts an annual fall community campaign that is comprised of various segments including corporate, residential, workplace and main street business campaigns. A volunteer campaign cabinet serves as advisors and ambassadors for our annual campaign.

## **HOW A CONTRIBUTION IS INVESTED**

Our United Way, conducts annual campaigns in Fort Atkinson, Jefferson, Lake Mills, Palmyra, Sullivan and Whitewater; and with your help, our United Way has been able to support over 30 partner agencies and programs throughout our service area. Contributions are carefully invested in programs that provide direct benefits to local residents in the following areas of need.

### **Community Solution Areas of our United Way, your investment working to...**

#### **Improve Community Health**

Individual and Family Services (Epilepsy Foundation)  
Mental Health Services (Integrated Counseling Services)  
Mental Health Services (Jefferson NAMI)  
Patient Services (Rainbow Hospice)  
Basic Health Services (Rock River Free Clinic)  
Basic Dental Services (Community Dental Clinic)  
Support During Recovery (Sable House)  
Blood Drive Services (Red Cross)

#### **Build & Maintain Family Financial Stability**

Housing, Food and Counseling Assistance (Bethel House)  
Medical Ride Program (FISH)  
Information and Referral (First Call for Help and Information)  
Emergency Services (Red Cross)  
Disaster Services (Jefferson Red Cross)  
Citizen Advocacy, Housing Assistance (Community Action Coalition)  
Job Training & Coaching (Opportunities Inc.)

#### **Address the Needs of At Risk Youth**

Mentoring (Big Brothers and Big Sisters)  
Youth Development (Boy Scouts of America, Glaciers Edge Council)  
Youth Development (Girl Scouts of Badger & Blackhawk Councils)  
After School Programming (Boys & Girls Club)  
Youth Counseling (Counseling Center of Watertown)  
Recreational Opportunities (Hoard Curtis Scout Camp)

#### **Integrate Diverse Populations**

Information and Referral (Conexiones Latinas)  
English Language Services (Jefferson County Literacy Council)  
Activities, Programming (Fort Atkinson Senior Center)

English Language Services (Whitewater Community Education)  
Community Volunteer Network (Faith In Action)

### **Strengthen Families**

Family Resources (Early Intervention)  
Early Childhood Education (Head Start)  
Pre-School Scholarships (Small World Pre-School)  
After School Programming Scholarships (Community Action, Inc.)  
Youth and Family Counseling (Counseling Center of Watertown)  
Advocacy and Support (People Against Domestic & Sexual Abuse, PADA)  
Latino Family Care Center (The Furnace)  
Family Services (Whitewater Family Connections)

## STEP 2: Involve Your Administrator, CEO, General Manager

The success of your campaign depends on the commitment and involvement of your chief executive. Have your Administrator, CEO or Plant Manager:

- Authorize your campaign plan.
- Work with you to set a challenging fund raising goal.
- Allow company time for educational employee meetings and on-site agencies tours if possible.
- Endorse the campaign through a personal letter to each employee.
- Approve payroll deductions, if not already in use.
- Personally pledge a gift.
- Confirm his/her attendance at the campaign kick-off event and other meetings.

### SAMPLE CEO ENDORSEMENT LETTER

Dear Employee,

(Company Name) is very proud to partner with Our Local United Way in focusing on what matters most in our community---the success of our children, the strength of our families and our community and the health and self-reliance of our neighbors and friends.

As we launch this year's United Way campaign, it is important to recognize that each of us can play an important role in improving the quality of life for all of us. In my opinion, there is no better way to make a lasting difference in the health and well-being of our community than through the United Way of Jefferson & North Walworth Counties. Here's why:

- When you give to United Way, your gift stays right here in the Jefferson & North Walworth Counties and is invested in areas identified by our community as being of the highest priority.
- Your one gift helps more than one person, one family or one charity – it helps build a stronger community for all of us.
- United Way is the collective power of people working together toward long-term solutions, not short-term fixes.
- United Way is focused on results to ensure that your gift will make the greatest difference possible.

Whether you are a first-time giver or someone who has supported United Way for many years, your gift is appreciated. Please join me as we help United Way focus on what matters most in our community, the improved lives of family, friends and neighbors.

Sincerely,  
(CEO/LABOR LEADER NAME)

## SAMPLE CEO THANK YOU

The employees at <COMPANY NAME> are second to none! Not only are you committed to doing your part for this company, but you also show that you care about our community by supporting United Way.

Thanks to all of you, <COMPANY NAME> raised <DOLLAR AMOUNT> for the United Way of Jefferson and North Walworth Counties this year! Because you care, people in our community who really need help will be able to find it through United Way services.

So thank you for your generosity. And as you travel around our community and see the names of any of the 30 United Way partner agencies, I hope you'll feel proud knowing that you are helping make those services available for thousands of people.

Thank you for helping to make our community a better place for all of us.

# STEP 3: Establish a Goal

## Determine Your Company's Potential for Giving

Establish your employee campaign goal by considering previous year's campaign results.

Year	# Donors	% Participation	Amount Raised

Other numbers to consider:

$$\frac{\$ \text{Last year's employee contributions}}{\text{Total \# employees}} = \$ \text{Per capita gift}$$

$$\frac{\$ \text{Last year's employee contributions}}{\text{Total \# givers}} = \$ \text{Average gift}$$

$$\frac{\text{\# of givers}}{\text{\# of employee's}} = \% \text{ participation}$$

Goals should be set for both participation and amount raised. Goals should be challenging but attainable!

## Campaign Awards

The United Way of Jefferson & North Walworth Counties will hold a workplace campaign awards event on **January 13, 2009**. Invited guests include Workplace campaign coordinators, campaign volunteers, representatives of our United Way partner agencies and United Way board members. This event provides a platform for our partner agencies, board of directors and campaign cabinet to say a big THANK YOU to you and every company, organization or school district that participated in our 2008 United Way campaign.

## STEP 4: Recruit a Campaign Team

Select a team to help plan and run your campaign.

Include people from all levels of your organization.

Assign specific duties that use each team member's skills, talents and interests.

Set a schedule for the campaign and plan to meet regularly. Our United Way is asking that employee campaigns be completed prior to December 1, 2006.

Campaigners help solicit employees. They are very important to the success of your campaign! Campaigners are employees who meet one-on-one with others, ask them to give to the United Way, and answer questions that they may have.

For individual solicitation, one campaigner should be recruited for every 10-15 employees. Campaigners will need to follow-up with those who are unable to attend Workplace campaign meetings or make a pledge commitment at the meetings.

### **The "Ask" - it's easy as 1, 2, 3...**

Here is a step-by-step guide to soliciting contributions for the United Way community campaign. Begin following these steps as soon as possible. Your job will be easier if you take advantage of early campaign publicity. Leave ample time for call-backs and to work around vacations and unexpected absences.

#### 1. Learn as much as you can about United Way

- Take a tour of one or more United Way member nonprofit organizations to see contributed dollars in action.
- Read United Way materials.
- View the United Way campaign video.
- Make your own generous contribution.
- Visit United Way on line @ [www.ourunitedway.com](http://www.ourunitedway.com)

#### 2. Make your introduction and opening comments

- Solicit face-to-face. Simply leaving materials for someone to read is usually ineffective. It is essential to answer any questions that exist.
- Call first on employees you know best. This will help build a pattern of success.
- Share our United Way Pledge Card or Brochure with them.
- Encourage your prospect to talk. Check their awareness of United Way and find out what their interests are.
- Explain why you support our United Way.

3. Ask them to consider giving using payroll deduction
  - It's easier when payments are spread over the year.
4. Answer questions/objections
  - If you don't know an answer, be honest. Tell them you don't know but you'll find out. Call our United Way at 920.563.8880 if you need help answering a question.
  - Don't pressure anyone to give.
5. Ask for the pledge
  - The single biggest reason people cite for not giving to United Way is that they haven't been asked. This makes your role as a solicitor vital. People give to people.
  - Return pledge cards from contributors and non-contributors to your employee campaign coordinator.
6. Say thanks
  - Express appreciation even if you received a refusal, or if you believe a contributor could have given more.

**A very important note!** The United Way of Jefferson & North Walworth Counties recognizes that giving is a personal decision. Our United Way strongly discourages and works to eliminate coercion of any kind in the solicitation process.

## STEP 5: Promote Your Campaign

Spread the word about your company's commitment to United Way and generate excitement amongst your employees about their upcoming campaign! In addition to the sample CEO letter included as part of this guide, each Workplace campaign coordinator is supplied with a campaign kit that includes the following items for use during your company's United Way campaign.

- Posters appeal and reverse "thank you" posters ideally placed in prominent locations throughout your company.
- Campaign Thermometer, ideally placed at the building entrance, in break rooms, on a bulletin board.
- Table Top Display, provides a brief, visual overview of our United Way.
- Updated* Pledge cards, if possible, personalizing the cards with the name of each employee will positively affect your company's campaign.
  - The pledge form is printed on 8.5" by 11 ncr paper or single sheet
  - Our United Way accepts Visa and MasterCard
  - Community Solution areas are printed on the back of the pledge form, this section highlights each of our United Way partner agencies.
- First Call for Help and Information postcards, these easy reference postcards highlight our United Way's First Call for Help and Information telephone number.
- Our Web site - [www.ourunitedway.com](http://www.ourunitedway.com)
- Desktop Video – *Top Ten Reasons to Invest in United Way*

Need more supplies? Call Dan at 920.563.8880

## STEP 6: Conduct Meetings and Educate Employees

Group presentations are the most effective way to reach all employees in an organization and they make the most efficient use of time. The following is a sample agenda of an effective group solicitation meeting:

Agenda Item	Presented By	Est. Time
Opening Remarks	Workplace Campaign Coordinator (WCC)	1 min.
CEO Endorsement	Administrator, CEO, General Mgr.	1 min.
United Way Overview <ul style="list-style-type: none"> <li>- What is United Way?</li> <li>- Volunteerism</li> <li>- Local needs</li> <li>- How contributions help</li> <li>- Why give</li> </ul>	United Way Staff	5 min.
Video (if available)		3 min.
Speaker	United Way Agency or fellow employee who has used a United Way service	5 min.
Ask for the Gift	WCC	2 min.
Closing Comments <ul style="list-style-type: none"> <li>- Thank you</li> <li>- Collect pledge cards</li> </ul> **	WCC	1 min.

\*\* Be sure to do follow-up on collecting pledge cards from those who were unable to attend campaign meetings or were not ready to turn it in at the closing of the meeting.

### Meeting Checklist:

- Room is Reserved
- Room Setup is Confirmed
- TV/VCR Reserved and Operable
- Food/Catering is Ordered
- Speakers are Confirmed
- Campaign Materials
- Meeting Notices are Posted

Need a speaker from United Way or from a partner agency? Call Dan at 920.563.8880.

## STEP 7: Have Fun!

It always feels good to help others but here are some ideas to make your Workplace campaign FUN too!

- Incentives (a drawing) for turning in a pledge card
  - Day off with pay
  - Golf with CEO
  - CEO Outing
  - Company logo wear
  - Cups/mugs
  - Totes
  - Prizes
  
- Volunteer Group Project at a United Way agency - a volunteer "Day of Caring"
  
- Tours of United Way Agencies
  
- Games / Contests
  - Costume Contest or Pay to Dress-Up Day (with a theme)
  - Prettiest Baby or Cutest Pet contest
  - "Guess who" contest using old school pictures employees
  - Volleyball, softball or bowling tournament
  - Talent show
  - Funny fashion show (70's clothes, dress like celebrities)
  - Art/coloring contest
  
- Food Events:
  - Ice Cream Social (a great time to talk about United Way)
  - Ham Biscuit Breakfast or Hot Dog Lunch
  - Cookie Break
  - Bake Sale
  - Best Dessert Contest (contestants pay an entry fee)
  - BBQ
  
- Special company campaign theme(s)
  - Examples: United Way...the way <COMPANY> cares!
  - Caring for our community the UNITED Way!
  - Be a Life Saver
  - People Who Care
  - Catch the Spirit
  
- Victory celebration with CEO following up on promise to \_\_\_\_\_ if the company meets their goal

## Step 8: Thank Everyone!

How do you say *thank you*?

- Send or post a Thank You letter from the CEO for everyone's support.
- Plan a special campaign victory celebration for reaching goal.
- Present special incentive items to employees who met pledge requirements.
- Send special Thank You notes to campaign committee.
- Put a special article in the company newsletter.
- Make a display of pictures taken during campaign and put a big "Thank You" sign on it.
- Reverse our United Way campaign posters to reveal our thank you poster.
- Hand out candy kisses!
- Pass out Kudos snack bars!

How does United Way say thank you?

Whenever a donor contributes to our United Way and provides us with a home address, our United Way will send a thank you postcard or letter for any donation. Leadership givers, those who donate more than \$250, will receive a special note of recognition unless anonymity is requested.

Some donors do not provide our United Way with their home address and in this case, the United Way will send a thank you letter to the company addressing all employees. This letter is often used in a company's newsletter.

## Step 9: Report Your Results

*Share the good news with United Way!*

Enclosed in your campaign kit is “campaign envelope” that needs to be completed and returned to our United Way office. The campaign envelope is divided into seven sections and is a necessary tool that provides our United Way with information needed for recording and reporting purposes.

Section 1) Company Information

Section 2) Volunteer Information

Section 3) Employee Gift Information

Section 4) Corporate Gift Information

Section 5) Grand Totals of Employee and Corporate Gifts

Section 6) WCC Checklist – Press Release

Section 7) Call United Way at 920.563.8880 for envelope pick-up or drop-off.

## Sample Press Release

FOR IMMEDIATE RELEASE      Contact:      Alice Steindel, Public  
Relations

1.888.555.1212

**Heading** →

### **Archer Rockwell announces United Way investment**

**Announcement** →

Whitewater, WI –September 30 2008 – Joe Stindel, President/CEO of Archer Rockwell, announces that the firm’s workplace campaign generated a \$2,500 contribution to the United Way of Jefferson and North Walworth Counties.

**Quote** →

“In giving to United Way, Archer Rockwell and its associates are able to touch the lives of people in our local communities” said Stindel, “United Way and it’s service partners address numerous issues such as healthcare and housing, in addition to programs that enable children and youth to succeed in life. “

**Company Info** →

Located in Whitewater, WI, Archer Rockwell is a privately held consulting firm specializing in industrial psychological and human resource development.

**United Way Info** →

The United Way of Jefferson and North Walworth Counties partners with over 32 health and human service agencies that provide local services throughout the communities of Fort Atkinson, Jefferson, Lake Mills, Palmyra, Sullivan and Whitewater. For more information about United Way, contact 920.563.8880 or visit [www.ourunitedway.com](http://www.ourunitedway.com) . United Way - investing in what matters; community, working together and results.

**Photo Info** →

Pictured from left to right are representatives of Archer Rockwell’s United Way committee, Joe Stindel, Alice Stindel, Sara Harkness, Britt Cary and Jeff Vittoe.

**Daily Union**

28 West Milwaukee  
Fort Atkinson, WI 53538  
920.563.5563 P  
920.563.2329 F  
[www.dailyunion.com](http://www.dailyunion.com)

**CONTRIBUTIONS**

The Daily Union will print photos of business contributions of \$500 or more given to nonprofit or charitable organizations and government institutions. Donations of a lower monetary amount or value will be reported as a news item with out a photo.

The exception is for non-profit/civic organizations and youth organizations/school groups donating to a charitable cause. Then, the minimum donation amounts eligible for a photo are \$250 and \$50, respectively.

Charitable, non-profit, youth and civic organizations may have a publicity photo taken prior to a fund-raising event.

**PHOTO POLICY**

Daily Union reporter-photographers are available for photos on a first-come, first-served basis. Whenever possible, please call at least several days to a week ahead of time to schedule a photo, preferably for the afternoon. Have a press release with pertinent information about the photo topic (who, what, where, when and why and contact person's name and phone number) prepared to give the photographer.

If a photographer is not available, you may submit for publication a high-quality photograph (set digital cameras on highest resolution possible so, for instance, a horizontal, 3-column photo is 6.5 inches wide at 200 pixels per inch). Include caption information and a contact person's name and telephone number.

Photographs for special day/week/month observances and proclamation

signings will be printed for non-profit organizations only. (We suggest an action photo rather than “grip-and-grin” picture of, say, sitting at a desk.)

**Whitewater Register**

162 West Main Street

Whitewater, WI 53190

262.473.3363 P

262.473.5635 F

Step 10: Take a deep breath and

# Relax!

You and your campaign team are awesome! Thank you!