

EMPLOYEE CAMPAIGN COORDINATOR HANDBOOK

When a community
joins hands, everyone wins.



LIVE UNITEDTM





Congratulations on being selected as your company's Employee Campaign Coordinator.

More importantly, thank you for committing to make our community better by Living United!

As your company's go-to person, you will serve as the United Way advocate, storyteller and point person for what I expect will be this year's history-making campaign. I sincerely appreciate your leadership on behalf of United Way of the National Capital Area (United Way NCA) and know you will enjoy planning, executing and monitoring your organization's campaign. While it is a big undertaking, this handbook will help you through the process.

Designed to serve as your road map to campaign success, this guide contains useful planning timelines, key messages, creative ideas and effective strategies for making the ask. It will support you as you progress through each phase of the campaign.

Remember, your United Way NCA Corporate Partnership Manager is always available and ready to assist, so feel free to call or email anytime. Also visit our website at www.UnitedWayNCA.org for links to valuable tools, printable materials and other helpful resources.

Again, thanks for showing your community how to Live United!

Sincerely,

William A. Hanbury
President and CEO
United Way of the National Capital Area



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SECTION 1:

ROLE OF THE EMPLOYEE CAMPAIGN COORDINATOR

The Importance of Being an Employee Campaign Coordinator:

What's the role of an Employee Campaign Coordinator (ECC)? To encourage co-workers to participate in creating a stronger community by planning, coordinating and implementing an effective United Way of the National Capital Area (United Way NCA) workplace campaign. To open their minds to the pressing needs that surround us every day. To inspire them to **Join Hands and Live United**.

Responsibilities include:

- Attending ECC trainings offered at the beginning of each campaign season.
- Working closely with the United Way NCA Corporate Partnership Manager to develop an effective campaign plan.
- Recruiting a campaign committee from key areas of the organization.
- Coordinating the distribution of campaign materials and collection of pledge cards.
- When managing an electronic campaign, informing your United Way NCA Corporate Partnership Manager via email of which dates you want your donor website active, when you will send your electronic donor file, when you want the donor website shut down, and when you will need the final payroll file.
- Coordinating kickoff and recognition events.
- Promoting the campaign within your organization and publicizing results throughout.
- Holding a separate meeting for Leadership Givers and prospects.

- Providing all associates and retirees the opportunity to give.
- Thanking donors and volunteers for their generosity.
- Completing the campaign by submitting the Campaign Reporting Envelope (CRE) and pledge forms to United Way NCA's administrative office.
- Evaluating and making recommendations for next year's workplace campaign.

Key attributes of successful ECCs:

- Outgoing, friendly and trusted by fellow employees.
- Influential both with management and peers.
- Organized — managing a campaign is much easier with sound preparation.
- Enthusiastic about the campaign, and the company's role.
- Positive attitude and always ready to help employees with all aspects of the campaign.
- Sincere — the most powerful employee appeals come from the heart.

How United Way NCA helps you with your campaign:

Your United Way NCA Corporate Partnership Manager is always ready to assist you with planning and managing your workplace campaign. He or she has helped many other ECC's in our area put together programs that are successful, year after year. Whenever you need assistance, just reach out to them via phone or email. You'll also find plenty of good advice online, at www.UnitedWayNCA.org.

Follow the above link to our Workplace Campaign site where you can:

- Find information on participating in a Lunch & Learn Brown Bag Series.
- Ask your United Way NCA Corporate Partnership Manager for the latest Day of Caring volunteer opportunities.
- Find success stories and best practices.
- Access links to videos.
- Download campaign materials including brochures, pledge cards, sample campaign letters, posters, PowerPoint presentations, and more.
- Get various other assistance.

START BUILDING YOUR CAMPAIGN TEAM A successful campaign begins with a great leadership team. Recruit people who believe in United Way NCA and its goals, and will help others get excited about the campaign. Make sure to include employees from all areas and levels of your organization.

SECTION 2:

UNITED WAY NCA OVERVIEW



Who We Are

United Way NCA advances the common good by creating opportunities for a better life for all. By bringing together caring individuals and organizations throughout the area, we successfully identify strategic solutions to our region’s toughest challenges and are able to direct funding to where it’s needed most.

Your workplace campaign helps us—together with our more than 730 member nonprofit organizations—to directly impact critical community needs in the areas of **Education, Financial Stability and Health**—as well as continuing to provide a safety net by addressing important basic needs.

What We Do Specifically, United Way NCA...

- Efficiently raises and allocates funds to support a strong network of more than 730 quality member nonprofit organizations, as well as needed services throughout the region.
- Offers individuals and local businesses an easy and meaningful way to support those causes of greatest interest through workplace campaigns and other giving opportunities.
- Convenes community leaders and volunteers to identify and address critical, unmet needs through focused grants, collaborations, and other initiatives that impact the community.

DID YOU KNOW? In the past five years United Way of the National Capital Area distributed \$142 million to advance the common good in the greater Washington area. Last year, 228 grants totaling \$1.65 million were awarded to programs focused on helping children and youth succeed, improving health and wellness as well as strengthening and supporting families throughout the eight regions we serve.

EDUCATION: By working with our member nonprofit organizations, United Way NCA works to help put our children on the road to lifelong achievement.

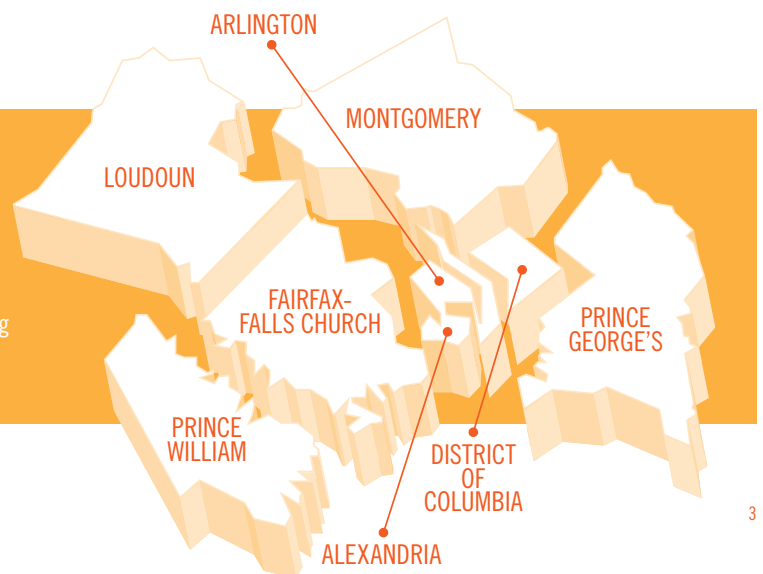
FINANCIAL STABILITY: Help us provide opportunities for workplace training and development, and increase financial literacy throughout the community.

HEALTH: Our goal at United Way NCA is to increase the numbers of healthy children, young people and adults in our community, through better access to care and information.

Advancing the common good is not just about helping one person at a time, but also about addressing the underlying causes of problems to create long-lasting change. We are all connected and interdependent. It takes everyone in the community working together to create a brighter future, which is why we encourage everyone to **Live United: Give, Advocate and Volunteer.**

Where We Do It

United Way NCA touches the lives of people in communities throughout the greater Washington area in the following eight regions: Alexandria, Arlington, District of Columbia, Fairfax-Falls Church, Loudoun, Montgomery, Prince George’s and Prince William.





SECTION 3:

SEVEN STEPS TO A SUCCESSFUL CAMPAIGN

1. Secure top-level management support

Support from top management can make your job easier and your campaign more successful. Find out what resources are available and strive for the following commitments:

- Management will allow time for you to coordinate the campaign.
- Your CEO will write a letter endorsing the campaign.
- Management will speak at employee meetings and events.
- Time and budget will be allocated for campaign related activities and incentives.
- Your CEO will appoint a Senior Executive Campaign Chair.
- The company will provide a corporate gift to match employee giving, e.g. dollar-for-dollar.
- A separate meeting for senior management will be held to get their support and visible leadership.

2. Recruit a team

Having others assist you with the campaign will make it fun and easy for everyone involved. Here are some tips for recruiting your committee:

- Make sure to include representation from all areas and levels of your organization.
- Include a member of management on your committee to focus on Leadership Giving.
- Recruit people who believe in United Way and will help others get excited about the campaign.
- Assign roles and responsibilities.
- Strive for campaign volunteer ratio of 1 for every 10–20 employees.

- Recruit site coordinators for each department and remote locations to help implement strategy.

3. Develop a campaign plan

- Develop a timeline (see section four for an outline). The most successful campaigns conclude within two or three weeks after launch.
- Identify the culture of your company and choose strategies that will fit nicely within the workplace environment.
- Review the strengths of past campaigns and establish a challenging campaign goal with your CEO that focuses on growing this year's effort.
- Look at participation levels in previous campaigns and set a participation goal.
- Identify who has been giving and who hasn't. Have you included all locations, shifts, part-time employees, retirees, divisions and labor unions? Develop a strategy for reaching potential donors.
- Set achievable, measurable goals, and track results.
- Orchestrate fundraisers to make a team-contribution to a United Way NCA Community Impact Fund. Schedule these throughout the year to keep your organization's community engagement front and center.

“Companies who recruit and use a campaign team have a 122% increase in per capita giving!”

CAMPAIGN BUILDER: Have the CEO and Leadership Giving chair offer a personal thank you to all Leadership donors.

4. Organize a Leadership Giving program

Leadership givers demonstrate their involvement and commitment with an annual gift of \$1,000 or more.

- Have a member of management recruit others for this program.
- See section eight for more information on utilizing Leadership Giving in your campaign.
- Begin your leadership campaign before the general campaign. Your Leadership donors will show how they are invested and will help to inspire others to give.
- Develop your own company leadership giving levels and internal recognition program.

5. Promote your campaign

Educating your colleagues about the value and the work of United Way NCA is the best way to gain their support. Your United Way NCA Corporate Partnership Manager is an excellent source for any materials and assistance you may need.

- Offer member nonprofit tours to your employees.
- Utilize United Way brochures and posters.
- Use technological resources such as Intranet, e-mail and/or voicemail, to pass along information about United Way to all employees.
- Use incentives and other forms of recognition to thank employees for their generosity.
- Incorporate opportunities for employees to not just give, but also to volunteer and advocate on a year-round basis.

- Ask employees to be sure to provide their email addresses when making their pledges so they can follow their investments and stay involved all year long.

6. Kickoff your campaign

A kickoff rally can help bring fun into your company campaign and help employees understand the importance of participation. Be sure to include the following in your kickoff event:

- A United Way NCA campaign video.
- Guest appearances by a United Way speaker, or a representative from a member nonprofit organization and a beneficiary from your community.
- CEO and labor-leadership campaign endorsement.
- Employee testimonial.
- A direct “ask” for employees to make a United Way NCA contribution.
- Refreshments.

7. Say thank you!

Everyone likes to feel appreciated and acknowledged for a contribution. After the campaign has concluded, it is important to thank everyone for supporting our community through United Way NCA.

- Conduct a special celebration with food and words of thanks from management. Remember to invite retirees.
- Send a note or e-card letting each donor know how much the community appreciates his or her gift.

You'll find many more campaign ideas, best practices and success stories at www.UnitedWayNCA.org

SECTION 4:

CAMPAIGN PLANNING WORKSHEET

PHASE ONE (at least six weeks before kickoff)	✓	NOTES FOR FOLLOW-UP:
Meet with United Way NCA Corporate Partnership Manager		
Obtain CEO endorsement and support		
Recruit campaign team		
Get sales tax license for auction (as applicable)		
Train team/assign tasks		
Develop campaign plan: <ul style="list-style-type: none"> • Goal • Timetable • Publicity/Promotions • Incentives 		
PHASE TWO (at least four weeks before kickoff)	✓	NOTES FOR FOLLOW-UP:
Develop a Leadership Giving campaign		
Secure management's approval of plan		
Plan and market the campaign kickoff		
Schedule/announce campaign kickoff		
Arrange member nonprofit speakers and tours		
Send letter from top executive to all employees		
PHASE THREE (in the final week before kickoff)	✓	NOTES FOR FOLLOW-UP:
Send reminder about kickoff meetings		
Arrange for announcements at company meetings		
Re-check food and beverage orders for expected turnout		
KICKOFF		
PHASE FOUR (one week after kickoff)	✓	NOTES FOR FOLLOW-UP:
Report progress to United Way NCA Corporate Partnership Manager		
Send reminders to employees		
PHASE FIVE (three weeks after kickoff)	✓	NOTES FOR FOLLOW-UP:
Host a thank you event		
Submit final results to United Way NCA Corporate Partnership Manager		
PHASE SIX (anytime throughout the year)	✓	NOTES FOR FOLLOW-UP:
Attend United Way NCA events		
Participate in Days of Caring volunteer opportunities		
Offer new hires the chance to give through payroll contribution		

CHOOSE ROLES FOR MANAGEMENT AND TEAM MEMBERS Assign detailed roles and responsibilities that match managers' and employees' unique abilities and influence. Assign site coordinators for each department and at each remote location to help implement campaign strategy.

SECTION 5:

EMPLOYEE PLEDGES — MAKING THE ASK



People give to United Way because they believe in what we do. Your knowledge, enthusiasm and commitment to supporting United Way NCA are key to encouraging employee pledges. Sincerely communicating your commitment to supporting the community through United Way NCA really does make a difference. Leaving pledge cards in employees' mailboxes and hoping they will be returned is not recommended.

Be Prepared

If possible, team members should be assigned to speak with individual employees about a potential donation. Before beginning, each team member should prepare himself or herself by:

- Showing commitment to United Way NCA by increasing his or her own pledge before asking co-workers to pledge themselves. It is much easier to ask others to do what you have already done.
- Watching the campaign video to see imagery about people who have been helped by United Way NCA.
- Learning more about United Way NCA and its impact in the community.

“The average gift increased by 33% when a company set a campaign goal.”

Five Steps to a Successful Ask

1. Get the donor's undivided attention.

- Consider catching the donor on a break, staff meeting or at an organized staff event for the sole purpose of asking them to consider participating in the campaign.

2. Explain the purpose of United Way NCA and why you support it.

- Bring United Way NCA materials and be prepared to explain them.
- Share a personal story and/or provide United Way NCA facts and stats.

3. Ask for an increase.

- With new givers ask for a first-time gift.
- Consider asking for a specific increase such as \$5 more per week or pay period.

4. Handle concerns.

- Know your materials, answer questions honestly — never guess. If you don't know the answer to a question, let the donor know you will find out and then follow up with your United Way NCA Corporate Partnership Manager.
- Recognize that some donors have real concerns; people have a right to feel good about their gift. If your colleagues would like to contact your United Way NCA Corporate Partnership Manager directly with questions, encourage them to do so. Your representative is here to help.

5. Say Thank you.

- Regardless of what the donor decides, thank him or her for their time.
- People like to know their gift is appreciated.

DID YOU KNOW? For the price of a large soda, you could provide 60 meals to a United Way NCA funded food pantry?



SECTION 6:

MANAGING OBJECTIONS

Potential donors may have questions concerning United Way NCA or your workplace campaign. Your sincerity and personal commitment are the best tools to use when responding to an objection. Since most objections are based on misconceptions, respond with, “If that were not an issue would you consider making a pledge?” By providing the correct information, you can usually overcome the objection, which may lead to a pledge.

Tips for Managing Objections

LISTEN to what is being said. Listening promotes openness and acceptance.

ESTABLISH RAPPORT. Objections are not personal. Often, just talking to people about why giving is important/finding out what’s important to them will put them more at ease about the campaign process.

DO NOT ARGUE if you receive objections from someone you are soliciting.

ANSWER OBJECTIONS WITH FACTS.

SAY THANK YOU. Regardless of the prospect’s response, always leave with a smile and a “thank you.”

REMEMBER TO THINK LONG-TERM. Every question provides an opportunity to communicate how United Way NCA is building a stronger community for us all. You may not get the pledge this year, but you are planting the seeds for the future.

ARRANGE FOR A UNITED WAY NCA MEMBER NONPROFIT PRESENTATION The best way to win employees interest and support is to let them see and hear for themselves the impact that their donations to United Way NCA can have. Contact your United Way NCA Corporate Partnership Manager to help arrange for a special guest speaker for your kickoff event.

Talking Through Common Objections

Here are some effective responses to common objections.

I live in a community outside of Washington, DC. Why should I give?

United Way NCA member nonprofit organizations provide services not only to residents of Washington, DC, but also to people living in surrounding regions. Consider giving to one of our regional Community Impact Funds to help residents in one of the other areas we serve, including: Alexandria, Arlington, Fairfax-Falls Church, Loudoun, Montgomery, Prince George’s and Prince William. You can also donate to any nonprofit of your choice located anywhere around the world.

I give directly to XYZ charity/organization. Why should I give to United Way NCA?

Giving to United Way NCA is the most efficient way to give because:

- United Way NCA adds value to your contribution by providing annual eligibility requirements for charities’ budgets and programs, ensuring that your gift is being used effectively.
- United Way NCA’s annual campaign efforts give area nonprofits a reliable source of funding without having to allocate scarce resources to solicit individual contributions. These organizations can count on United Way NCA to cost-effectively promote and administer a single campaign that raises money for many causes at once.
- While you may give to other worthy causes as well, view your United Way NCA gift as a “gift to the community,” because it supports a network of member nonprofits with wide reaching impact throughout the whole community.

“CEO endorsement of the United Way campaign increases the average per capita gift by more than 90%.”

If I stop working for my current employer, what happens to my payroll-contribution pledge?

Your pledge will not automatically be routed to your new place of employment or to your home. If you do change jobs or are no longer working, please contact United Way NCA’s Campaign Accountability Department at (202) 488-2000. At that time, you can decide whether you are able to fulfill your original pledge or adjust it. If you have switched jobs and your current employer runs a United Way NCA campaign, it is possible to set up payroll contribution through the new employer.

My spouse gives for both of us, why should I give to United Way NCA?

Research indicates that donors perceive that one of the most significant benefits of personal giving is the feeling of being part of a collective effort to solve problems and make a difference in their community. Be a part of your workplace community by joining with fellow employees in the United Way effort.

I’m never going to use these services, so why should I give?

One in three people in the greater Washington area benefits from the services provided by United Way NCA supported member nonprofit organizations. At one time or another, almost everyone has a health and human service issue and may need help. Most likely, you or someone you know has used services provided by such United Way NCA member nonprofits as the Boys and Girls Clubs, So Others Might Eat (SOME), American Heart Association, Boy Scouts of America and many others.

Some of our employees and their families are on tight budgets; should we invite them to be part of the campaign?

Yes, most people appreciate the opportunity to participate. Giving through payroll contribution is easy and convenient.

Payroll contribution allows everyone to participate by spreading the contribution over time. This allows those on tight budgets to participate and be part of the solution. Even a small amount per pay period makes a difference.

How can I be sure my donation will be used efficiently and effectively?

Every United Way is local and autonomous, including United Way of the National Capital Area. Your gift stays here to support more than 730 member nonprofit organizations that deliver services and run programs throughout the region, addressing challenges and deficiencies in the areas of education, financial stability and health, and providing a safety net for basic needs.

- United Way NCA annually vets each of its member nonprofit organizations on a variety of criteria. Visit www.UnitedWayNCA.org to review a complete list of our eligibility guidelines.
- United Way NCA employs a world class system of financial reporting. In independent audits we have received highly favorable reviews with unqualified opinions since 2002, and superlative reports with findings since 2007.
- Internal financial checks and balances were created to ensure our organization’s stability and accountability.

Visit www.UnitedWayNCA.org to:

- Learn about our impact areas, programs and initiatives
- Learn about our member nonprofits
- Find out about volunteer opportunities
- To learn about our Leadership Giving groups
- To see a list of our board of directors
- To view our financial information
- To join us on FaceBook and Twitter or read our blog
- And more.



SECTION 7:

KICKOFF RALLY

Decor

- United Way posters
- LIVE UNITED balloons
- United Way NCA podium mount
- Large screen with projected United Way NCA pictures

The Flow

- Show the United Way NCA Workplace Campaign video
- Tell “How I LIVE UNITED” stories
- Welcome participants
- Talk about Advancing the Common Good (Invite your United Way NCA Corporate Partnership Manager)
- Give a Community Impact Report (Education, Financial Stability and Health)
- CEO endorsement
- Labor-leadership campaign endorsement (if applicable)
- United Way NCA member nonprofit presentation
- Employee testimonial
- Ask loyal contributors to stand
- Thank Leadership Givers
- Make a direct ask for employees to make a United Way NCA pledge. Provide pledge forms or if hosting an electronic campaign, have computers at the rally so people can sign up right there. Consider having a special incentive for those that do.
- Provide Refreshments

Tips from Local ECCs

“For our campaign, we hold a car show at our Benning Service Center in Northeast, Washington, DC. We get people who may have not otherwise volunteered — really helping to raise money by bringing in their passion, which in many case happens to be their cars. It’s a great event. We have hundreds of volunteers, we raise tons of money for United Way NCA and it’s a lot of fun.”

— Charles Washington, Senior Public Affairs Manager, Pepco Holdings Inc.

“Last year, we put posters for the campaign in all of our elevators, so as employees took the elevators from floor-to-floor, they couldn’t help but think about the United Way NCA campaign.”

— Emily Bender, Senior Vice President, Human Resources, Orbital Sciences Corporation



CAMPAIGN BUILDER: To maximize employee traffic, build your kickoff around another high-interest event, such as a book and DVD sale, or a silent auction to which employees donate their own goods and services.

SECTION 8:

LEADERSHIP GIVING



The Leadership Giving program is designed to encourage and recognize individuals in our community who make gifts of \$1,000 or more to the annual United Way Campaign. Conducting a Leadership Giving campaign is one of the best ways to increase the success of your company's overall campaign. As an integral part of your employee campaign, Leadership Giving allows your employees to make a greater impact and sets your organization apart as a leader in our community.

STEPS FOR A SUCCESSFUL LEADERSHIP GIVING CAMPAIGN

Gain CEO and Leadership support

- Ask the CEO to appoint a well-respected member of senior management who is already giving at the Leadership level to lead your company's Leadership solicitation.
- Engage your CEO and senior management in leading, implementing and executing Leadership Giving.
- Meet with your management staff to make them understand the importance of Leadership Giving.

Develop your strategy

- Determine what works best for your organization: CEO breakfast, luncheon or end of the day reception.
- Make one-on-one requests of current and prospective Leadership donors.
- Secure Leadership gifts early by holding a Leadership drive prior to the companywide campaign kickoff. This allows company leaders to set the pace for the campaign and lead by example.
- Set goals for Leadership Giving: increased awareness, increased number of members, increased gift amounts.

Ask

- Have a local nonprofit beneficiary attend the event — first person accounts make powerful statements.
- The CEO should be present at the Leadership kickoff and ask others for their personal contribution.
- Have someone who has benefitted from services provided by a member nonprofit at the Leadership event.
- Promote Leadership Giving throughout your employee campaign.

Thank all Leadership Givers

- Have the CEO and Leadership Giving chair send a personal thank you to all Leadership donors.
- Visibly recognize all Leadership donors to encourage others.

SECTION 8: LEADERSHIP GIVING CONTINUED

CAMPAIGN BUILDER: Hold an off-site United Way Emerging Leaders event for employees under 40, encouraging them to “step up” their donations from prior years

UNITED WAY LEADERSHIP GIVING INITIATIVES

United Way sponsors three Leadership Giving groups — the Tocqueville Society, Women’s Leadership Council (WLC) and the Emerging Leaders Society — to further engage active donors.

United Way Tocqueville Society

Established locally in 1987, the United Way Tocqueville Society recognizes individuals making annual gifts of \$10,000 or more to the United Way campaign.

BENEFITS:

- Invitations to network with other community oriented philanthropists at Tocqueville events, including house parties, office events and receptions.
- Opportunities to influence organizational strategies in one-on-one meetings with United Way NCA’s top leaders.
- Frequent updates on the positive impact of contributions to United Way NCA, including organized member nonprofit site visits.
- Inclusion in United Way’s Book of Leaders, a global registry of more than 20,000 philanthropists who share a commitment to making positive change.

United Way Women’s Leadership Council (WLC)

The United Way Women’s Leadership Council recognizes women who make Leadership gifts of \$2,500 or more. The United Way Women’s Leadership Council is an engaged network of female philanthropists who recognize and encourage exceptional giving, and harness the power women have to bring about positive community change.

BENEFITS:

- Invitations to events, volunteer activities, and forums on topics ranging from art to public policy.
- Opportunities to provide input into organizational strategy and counsel on how to most effectively promote philanthropy among women in the greater Washington area.
- Frequent updates on the positive impact of their contributions to United Way NCA.

United Way Emerging Leaders

United Way Emerging Leaders is a group of passionate, community-focused, up-and-coming professionals who want to connect with like-minded men and women, serve their community and become leaders for change. Professionals in their 20’s, 30’s or 40’s who make an annual gift of \$1,000 to the United Way NCA or commit to the Step-Up Program with a contribution of \$300 are invited to become members.

BENEFITS:

- Invitations to exclusive special events and community-building activities.
- A chance to make an impact by taking part in meaningful activities including volunteer projects and community events.
- Opportunities to strengthen your network by connecting with like-minded Emerging Leaders at social events and exclusive sessions with business and community leaders in the national capital area.
- Enhanced leadership opportunities, with access to our Leadership Series and Board Internship Program.

SECTION 9:

CREATING A BIG BUZZ FOR A SMALL PRICE

You don't have to spend a lot of money to get the word out. These ideas are just a start to spreading a positive message.



WEAR THE SHIRT

Campaign staff, volunteers and other supporters love to wear the LIVE UNITED t-shirt, but don't stop there! Ask the CEO and senior leadership to wear the shirts to work.

Dress a statue or store mannequin in a t-shirt. (This might require cutting the shirt and creative use of duct tape.)

WINDOW DRESSING

Put together a window display of LIVE UNITED signs, posters, photos, stickers and other items for an office display case.

CONDUCT A CONTEST

Let the competitive juices flow. Who can write the best LIVE UNITED essay? Who rocks the mic at the LIVE UNITED poetry slam? Who has the best LIVE UNITED story?

WHAT'S YOUR SIGN?

Display LIVE UNITED or use your company name (for example, ABC COMPANY LIVES UNITED) on electronic signboards, marquee, billboards and other high visibility spots.

CHALK IT UP

Use chalk to write a large LIVE UNITED in front of the office, in the parking lot, or other paved space.

JEANS FOR A CAUSE

Piggyback on the almost universal popularity of a dress-down day at work. Employees can wear jeans to work if they donate \$5 and wear a LIVE UNITED sticker. Put a big glass jar for the money and a pile of stickers on the receptionist's desk or another central point.

THANK YOU-GRAM

Send a LIVE UNITED thank you to any and all who helped to put these ideas into practice, or for anything else.

MAKE A MOVIE

Create a video, starring your staff, on the subject of Living United. Employees can talk about why they decided to donate, as well as the satisfaction that they got from doing it, while encouraging others to get involved. This is a great way to personalize the campaign to your company.

LOOKING FOR CAMPAIGN SUPPLIES? YOU CAN ORDER UNITED WAY NCA BRANDED MATERIALS AT OUR ONLINE STORE BY VISITING, WWW.UNITEDWAYNCA.ORG, 24 HOURS A DAY, 7 DAYS A WEEK.

CAMPAIGN BUILDER: Set up an "interview corner" at your kickoff event and invite employees to be videotaped explaining why they've pledged, what goal they'd like to see their donations achieve, or why they have a personal connection to the cause. The finished video will make a great fundraising tool for next year!

You'll find many more campaign ideas, best practices and success stories at www.UnitedWayNCA.org

SECTION 10:

PRIZES AND OTHER INCENTIVES

Many companies have demonstrated that it doesn't take a lot of money to offer great prizes to reward employees for participating in campaign events. Not every prize has to be huge — people just like to be recognized. Here are some suggestions:

- Pizza party
- Paid time off
- Casual Fridays
- Call in "Well" Day
- Free hotel stay
- Sleep in late awards
- Prime parking spaces
- Open soda & candy machines
- Free oil change
- Shares of company stock
- Beauty or barber shop coupons
- Gift certificates
- Coffee served at donor's desk each morning
- Cocktail party or dinner at the CEO's home
- "Flee @ 3" coupon
- Corporate logo clothing
- Use of company car
- Airline tickets
- Lottery tickets
- Gift cards
- Golf lessons
- Tickets to plays, sporting events and concerts

"Using incentives in your campaign raises the per capita gift by an average of 240%!"



CAMPAIGN BUILDER: EXECUTIVE RECEPTIONIST OF THE DAY. Conduct a silent auction in which employees vote (with their cash contributions) to choose a "winning" senior executive who will then serve as the company's receptionist for a day or an afternoon.

SECTION 11:

COLLECTING THE PLEDGES



Avoid Common Errors:

One of the ways you can help ensure quick and accurate processing of your employees' pledges is to encourage neat and precise completion of the forms. Below are some of the most common problems we see when reviewing the pledges. If your team is completing their pledges in a group setting, review these recommendations with them before they fill in the forms.

- **LEGIBILITY:** Ask your colleagues to PRINT neatly. Cursive writing can be difficult to read.
- **CROSS-OUTS:** When someone makes a mistake, ask him or her to complete a new form.
- **ABBREVIATIONS:** To avoid confusion it is best to write out the full name of the organization the donation is intended for.
- **DESIGNATION CODE:** Make certain to use the correct designation code.
- **WRITE-IN NON-MEMBER NONPROFITS:** For designations to organizations that are not part of the United Way NCA network it is critical that the correct, full name of the organization is provided, as well as the full address including city, state and zip code. Write in designations must be to a 501 (c)(3) charity organization.
- **MINIMUM DONATIONS:** Remind your team that there is a minimum donation of \$25 to designate to a United Way member nonprofit organization and \$100 for non-member (write-in) designations. This will ensure their gift goes to support the cause of their choosing.

JOIN HANDS TO HELP OUR COMMUNITY LIVE UNITED

United Way Pledge Form Please print firmly in all CAPITAL letters

THANK YOU FOR YOUR PLEDGE

I have been contributing to United Way NCA for _____ years.

I am interested in joining the Tocqueville Society (for contributors of \$10,000 or more annually).

I am interested in joining the Women's Leadership Council (for contributors of \$2,500 or more annually).

I am interested in joining the Emerging Leaders Society (for contributors aged 25-30 of \$1,000 or more annually).

I am interested in including United Way NCA in my will, trust or estate plan.

CHOOSE HOW YOU WOULD LIKE TO INVEST IN A STRONGER, HEALTHIER COMMUNITY *Cash donations are not accepted.*

EASY PAYROLL CONTRIBUTIONS AMOUNT \$ _____ per pay period for a total annual gift of AMOUNT \$ _____ PER YEAR

or

ONE TIME DIRECT GIFT AMOUNT \$ _____ One time gift to be paid by:
 Personal Check Enclosed and made payable to United Way of the National Capital Area (preferred option).
 Securities Please call (202) 488-2000 when you are ready to transfer funds.
 Credit Card To make a contribution by credit card, please visit our website at www.UnitedWayNCA.org.

CHOOSE HOW YOU WOULD LIKE YOUR INVESTMENT DIRECTED

option A

CONTRIBUTE TO UNITED WAY OF THE NATIONAL CAPITAL AREA 8000: United Way NCA. Your contribution goes where it's needed most and provides the means to achieve United Way NCA's mission of improving lives by mobilizing the caring power of our community to advance the common good. AMOUNT \$ _____ PER YEAR

option B

UNITED WAY NCA IMPACT AREAS Your contribution will help solve some of our region's most critical needs in the areas of Education, Financial Stability, Health and Basic Needs.
 9012: Education 9013: Financial Stability 9014: Health 9015: Basic Needs

option C

UNITED WAY NCA COMMUNITY IMPACT FUNDS Our teams of local volunteers recommend the most impactful programs to fund, ensuring your contributions go where they will do the most good. Please specify region below. AMOUNT \$ _____ PER YEAR

9000: Alexandria 9002: Arlington 9003: District of Columbia 9004: Fairfax/Falls Church
 9005: Loudoun 9006: Montgomery 9007: Prince George's 9008: Prince William

option D

DESIGNATE A SPECIFIC NONPROFIT ORGANIZATION
 United Way NCA Member Nonprofit Organization (For a complete list of nonprofit partners, please visit www.UnitedWayNCA.org).
 Other nonprofit organization or other United Way must be a 501(c)(3). (Please include the COMPLETE address to ensure accurate processing).

Member Nonprofit Name: _____ Nonprofit Name: _____
 Designation Code: AMOUNT \$ _____ PER YEAR EIN#: AMOUNT \$ _____ PER YEAR
 Member Nonprofit Name: _____ Address: _____
 Designation Code: AMOUNT \$ _____ PER YEAR

SIGN HERE TO AUTHORIZE PLEDGE AND PAYMENT METHOD

I agree that if my designation is to an organization that is not an IRS-recognized 501(c)(3), is not in compliance with the United States Patriot Act, or if for any reason my donation is unclaimed by the designated organization, my donation will be directed to the United Way NCA general fund.

Please check here if you prefer that your gift remain anonymous.

Date _____ Signature _____ Total Gift _____

No compensation, goods or services have been given to the donor in return for their contribution. Important tax information: Gifts made to United Way are tax deductible within the limits of current law. Please keep your copy of this pledge form along with your year-end pay stub for payroll contributions. It will serve as a record of your donation to meet IRS regulation. United Way respects your privacy. We do not rent, trade or sell lists of donors.

THANK YOU
www.UnitedWayNCA.org

Go Green with United Way e-Campaign:

Cut down on paper and time with United Way's e-Campaign. This versatile solution allows your team members to complete their pledges from a simple, secure, online platform in just a few short steps.

Meanwhile you will enjoy real-time campaign reporting, convenient communication functions and other valuable benefits to make your campaign easier to administer and more successful.

To find out if your campaign qualifies, ask your United Way NCA Corporate Partnership Manager.


SECTION 12:

HOW TO COMPLETE THE CRE

The Campaign Report Envelope (CRE) is completed by the Employee Campaign Coordinator or their designee and submitted to United Way NCA as a summary and record of pledges made. Completed pledge forms and checks should be enclosed in the envelope. Depending on the size and duration of your campaign, you may submit them weekly, bi-weekly or at the end of your campaign.

Interim, partial reports enable United Way NCA to help you keep records and track progress.

Envelope Type
 WP A/R Misc. Adj.
 For United Way Use Only


 United Way
 of the National Capital Area

Campaign Report Envelope

United Way of the National Capital Area
 8391 Old Courthouse Road, Suite 200
 Vienna, VA 22182-3819

NOTE: Interim, partial reports enable the United Way Campaign to help you keep records and track campaign progress.

ACCOUNT NUMBER: _____

COMPANY / ORGANIZATION: _____

ADDRESS: _____

IMPORTANT INSTRUCTIONS

ENCLOSE IN THIS ENVELOPE: Fully paid contributions, checks and credit card requests. United Way copy of all pledge forms. Your company's/organization's pledge/designation forms (if United Way pledge forms are not used).

DO NOT ENCLOSE IN THIS ENVELOPE: Cash in any form (paper or coins).

FORWARDING INFORMATION:
 Standard Envelopes: Mail or Deliver Signed, Sealed Envelopes Directly To:
United Way of the National Capital Area
 Campaign Accountability
 8391 Old Courthouse Road, Suite 200
 Vienna, VA 22182-3819

Electronic Envelopes and Online Campaigns: processing@uwnc.org
 For additional information: (202) 488-2040
 campaignacct@uwnc.org

Please cross out any incorrect company / address information on the line.

All information on this report should reconcile with your Pledge Forms.

Please enclose **Pledge Forms** for accounting purposes, ALL pledge forms must be enclosed.

PARTIAL REPORT
 FINAL REPORT
 ADDITIONAL REPORT

	# OF GIVERS	PLEDGES / PAYMENTS \$	ENCLOSED PAYMENTS \$
Send yellow copy of pledge form to United Way. Send white copy to YOUR payroll department. Checks, credit card charges, direct bill. Please PAPER CLIP checks to pledge cards.	PAYROLL CONTRIBUTION		
Please enclose Corporate Pledge Card.	CORPORATE GIFT		
Make checks payable to United Way.	SPECIAL EVENTS		
TOTALS			

File # _____

Total # of Employees in Organization: _____ Date: _____

ECC (Employee Campaign Coordinator) Information: _____ Preparer's Signature: _____

Name: _____ Preparer's Name: _____

Phone: _____ Preparer's Phone: _____

Email: _____ Preparer's Email: _____

FOR UNITED WAY USE ONLY

CASHIER / DATE	AUDITOR / DATE	DATA ENTRY / DATE	PROOFER / DATE	CLOSED / DATE
----------------	----------------	-------------------	----------------	---------------

PLEASE MAKE A COPY FOR YOUR RECORDS

Your **Account Number** will be provided by your United Way NCA Corporate Partnership Manager.

Please mail the CRE to the address indicated on the envelope.

Please record any enclosed payments in each category in this column.

Please indicate whether this report is partial (you expect more pledges to follow); final; or an additional report, such as funds raised in a special event.

Please provide total dollar amount of pledges and payments in this column for each category (by row). The total of this column should equal your total campaign attainment.

Please provide contact information. The preparer should sign and date the CRE.

Tally number of donors giving by payroll contribution.

Total # of employees whether they participate or not.

Please be sure to make a copy for your records!

Special events including fundraisers or other campaign related activities that generate gifts other than individual pledges or donations.

Tally total # of donors giving by check, credit card or direct bill.

SECTION 13:

PUTTING PLEDGES INTO ACTION: YOUR PAYMENT SCHEDULE



Following are some best practices for getting your contributions into the community in a timely and efficient manner:

- Meet with your United Way NCA Corporate Partnership Manager and your payroll department early in your campaign planning to determine your payment strategy and schedule.
- Be sure to remit any paid-in-full donations with your pledge forms in your Campaign Report Envelope (CRE). Any cash collected should be remitted by check. These should be sent to:

United Way of the National Capital Area
Campaign Accountability
8391 Old Courthouse Road, Suite 200
Vienna, Virginia 22182

- Continuing Payroll Contribution payments should be remitted on a monthly basis beginning within 45 days of the close of your campaign (smaller campaigns could consider a quarterly schedule). These ongoing payments should be remitted to:

United Way of the National Capital Area
Accounts Receivable
8391 Old Courthouse Road, Suite 200
Vienna, Virginia 22182

- United Way remits all employee donations on a quarterly basis, based upon when funds are received from your company. Initial remittances to non-member nonprofits may be somewhat delayed to allow for a review of the designated organization by United Way NCA. For other questions, please contact your United Way Corporate Partnership Manager.
- Send a notice to your employees when the first payment is made, letting them know their contributions are going out into the community—a great opportunity to thank them again for their support!

For questions regarding Pledge Processing or Accounts Payable, please call (202) 488-2000.





SECTION 14:

SAYING THANKS

After the conclusion of the campaign, it is very important to thank all the employees who helped make your campaign a success. People want to feel appreciated when they have done something positive. Here are some suggested ways to thank your participating co-workers.

LIVE UNITED Balloons or Flowers

Surprise each contributor the last day of the campaign. Place a balloon or flower at their desk to thank them for their thoughtfulness.

LIVE UNITED Thank You Sack Lunch

Order LIVE UNITED sack lunches for every contributor. Include a thank you note from your CEO or include thank you drawings or letters from children served by a United Way NCA member nonprofit organization.



United Way NCA Merchandise

Give T-shirts, pens or note pads with the United Way NCA logo on them. Create your own or order items from United Way NCA's online store at www.UnitedWayNCA.org.

Scooping Up Success

An ice cream social is a great way to celebrate a successful campaign. Have the management team scoop up the ice cream and personally thank each employee.

Waffle/Pancake Breakfast

Have management serve up breakfast for everyone who contributed.

Barbecue or Pizza Party

Invite employees to a companywide lunch. Have executives cook or serve.

Candy Gram

Distribute candy bars to each participant with a thank you message attached.

Chip in for United Way

Place chocolate chip cookies on every employee's desk with a note thanking them for chipping in for United Way NCA.

CAMPAIGN BUILDER: To thank donors and volunteers for their participation, offer them an "I Live United" Badge which entitles them to enjoy their own "Dress Casual Day," on a designated future date.

SECTION 15:

FREQUENTLY ASKED QUESTIONS



When should our campaign take place?

Most happen between early September and mid- December, but they can take place any time of the year when a company's employee base is largest.

How long should our campaign last?

Most campaigns can be wrapped up in two weeks or less. The goal is to distribute and collect pledge cards while the United Way message is still fresh in employees' minds.

I have limited time to devote to a campaign. How can I work it into my busy schedule?

Reach out to your United Way NCA Corporate Partnership Manager. He or she is there to help you every step of the way. Let him or her know your limitations and come up with a plan together to make it easier for you. Another way to ease the strain is to recruit a committee. Assign tasks and assume a management role. Most importantly, start planning early. The earlier you start the easier the process will be for you.

Our work environment is not conducive to holding a campaign kickoff meeting. How can I involve our employees in the campaign experience?

Take the campaign to them. Some ideas are to use e-mails, voice mails, videos, letters from the CEO/president to get the word out. Also, attach balloons with United Way messages to their desks. Designate one room as the United Way Room and have participants play games on their breaks and turn in pledge forms for prizes. Use your company's intranet to provide information and results. Create and distribute a company video, starring your colleagues sharing their reasons for Living United in prior campaigns.

If I designate "United Way NCA" on my pledge card, where does my donation go?

The easiest way to make a difference in your community; these funds help drive community initiatives and provide the backbone for our continuing support of programs and advocacy throughout the region. Funds may also be directed to the Community Impact Fund, where they're used to address the most serious issues affecting the community, as well as to other important community building initiatives.

When do payroll contributions start?

The most common payroll contribution period usually runs from January 1 through December 31. Some companies use their fiscal year as their schedule for payroll contribution. United Way NCA does not set your payroll schedule; it is a company decision.

How do I get a member nonprofit speaker at my rally?

Your United Way NCA Corporate Partnership Manager can work with you to secure a speaker for your campaign kickoff. He or she can recommend speakers for your rally based on your workforce and interests. For planning purposes, please allow two weeks to process your speaker request. Since most speakers are doing numerous rallies throughout the campaign, it is not always possible to get the speaker you request. Please consider several options in case your first choice is unavailable.

Other questions?

Please don't hesitate to urge employees to contact your United Way NCA Corporate Partnership Manager directly with any questions or assistance they might need. Should you not have the answer to a United Way-related question or concern, your representative is there to help.

DID YOU KNOW? For the price of a casual dinner for two, an employee can provide 320 hours of tutoring, mentoring and after school programs to ensure local youth will do well in school.



SECTION 15: FREQUENTLY ASKED QUESTIONS CONTINUED

When your campaign is completed:

A. COLLECT ALL THE PLEDGE FORMS. You can send out a reminder e-mail, designate solicitors on your team to ask every person individually to turn in a form, or create a special incentive for pledge forms turned in by a certain date.

B. COUNT THE NUMBER OF DONORS AND THE AMOUNT RAISED IN EACH OF THE FOLLOWING CATEGORIES: check, credit card, direct bill and payroll contribution.

C. SEND IN THE CAMPAIGN REPORT ENVELOPE (CRE). Mail the Campaign Report Envelope (CRE) to our main office for processing.

United Way of the National Capital Area
Campaign Accountability
8391 Old Courthouse Road, Suite 200
Vienna, VA 22182

D. CALL YOUR UNITED WAY NCA CORPORATE PARTNERSHIP MANAGER to share results of your campaign efforts. Keep in mind that once your Campaign Report Envelope (CRE) is received, it goes through an auditing process. United Way NCA staff may follow up with questions. If people turn in their pledge forms after you've sent your envelope, please send them to the United Way NCA office at the above address. Contact your United Way NCA Corporate Partnership Manager if you have questions.

Key Contact Information

UNITED WAY OF THE NATIONAL CAPITAL AREA MAILING ADDRESS

For all correspondence, pledge forms, campaign reports (serving Alexandria, Arlington, District of Columbia, Fairfax/Falls Church, Loudoun, Montgomery, Prince George's, and Prince William counties).

8391 Old Courthouse Road, Suite 200
Vienna, VA 22182
Phone: (202) 488-2000
www.UnitedWayNCA.org



THANK YOU FOR BEING AN EMPLOYEE CAMPAIGN COORDINATOR!

THIS YEAR, REMEMBER TO ASK YOUR
CO-WORKERS FOR THEIR PERSONAL
EMAIL ADDRESS SO THEY CAN FOLLOW THEIR
INVESTMENT AND STAY INVOLVED ALL YEAR LONG.

LIVE UNITED™



United Way
of the National Capital Area

www.UnitedWayNCA.org