

# WHAT TO DO FIRST, NEXT AND LAST

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## The Weeks Leading Up to Your Campaign

- Meet with United Way of North Idaho staff.
- Map out your Campaign Timeline with dates and targeted campaign goals.
- Support your campaign success by ordering materials from United Way staff including brochures, pledge forms, and campaign posters.
- Request the United Way of North Idaho Campaign Video to show at your kickoff. A limited number of guest speakers are available as well but must be requested in advance.
- Meet with your CEO and/or senior management support on the campaign and targeted goals. Finalize targeted campaign goals including: total dollars, number of leadership givers, and desired percent of employee participation.
- Recruit and train your campaign team!
- Ask past United Way of North Idaho donors or members of senior management to “set the pace” by announcing their renewed gifts and announce any company match or NEW gifts so that there’s a benchmark.

## During your Campaign

- Distribute pledge forms and information about giving.
- Send follow-up emails once a week to keep up the enthusiasm. Include community facts and success stories that you can get from United Way of North Idaho.
- Hold additional events and meetings (bake sale, raffle, food drive, volunteer day, etc).

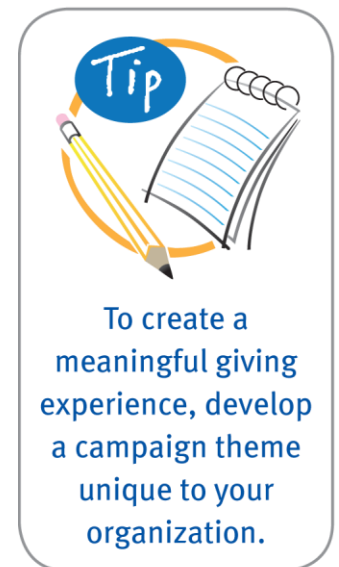
## Before Your Campaign Concludes

- Send reminder email that your campaign is concluding and contribution forms need to be submitted.

## After Your Campaign Concludes

- Collect pledge forms. Your Donor Relations Representative will supply you with the Campaign Reporting form and a cash confirmation form, and will assist you in finalizing the campaign.
- Announce pledge results to all staff and thank employees with a letter, email, or event. This is a great time to remind them of the United Way of North Idaho website where they can learn about how their investment is working in the community.
- Thank your campaign team, those who gave at the Leadership level and/or other special groups.
- Gather feedback and notes for next year.

**Congratulations** – You’ve just completed a successful campaign! Look out for an invitation in early summer to our annual campaign Celebration event where we celebrate the collective investment and impact to our community.



# WHO TO INVOLVE IN YOUR CAMPAIGN

## YOU

As Campaign Leader, you will lead the planning, implementation and evaluation of your organization's annual campaign. Because you will be asking others to give, it is important that you understand United Way of North Idaho's work in the community, and are able to communicate the benefits of giving, based on personal experience. United Way staff will guide and assist you with all your campaign needs and keep you informed about community issues and successes throughout the year.

### As the Campaign Leader, you will be asked to:

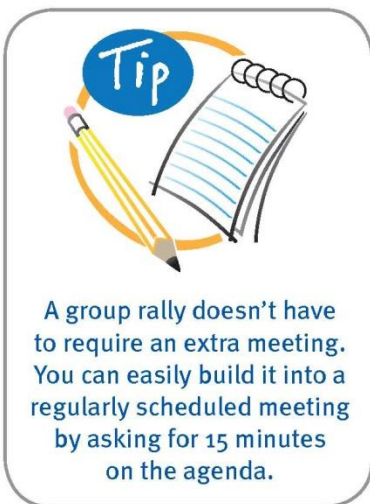
- Work closely with your Donor Relations Representative in creating a campaign strategy that includes:
  - Visible support from top management
  - Goals to increase giving
  - Leadership Giving
  - Educating employees about United Way of North Idaho
  - Giving everyone a chance to give
- Assemble a campaign committee that represents all levels of your organization;
- Prepare and submit pledge forms and campaign reports;
- Evaluate your campaign and make recommendations for next year.



### Your Company CEO and members of Senior Management

Visible support from company leadership is vital to your success. Ask your CEO and Senior Management to endorse the campaign personally to all staff in a presentation, e-mail or letter. A corporate gift provides a strong example of your organization's commitment to the community where its employees live and work.

Ask your CEO or Senior Management to host Leadership group meetings and invite individuals from your staff who have the ability to contribute \$500 and above.



### A Campaign Committee

Recruit volunteers from all areas of your organization to participate in the following activities:

- Campaign oversight of your company team
- Educate employees about the collective power of generosity and United Way of North Idaho's four initiatives
- Conduct employee and Leadership group meetings
- Organize special fundraising events
- Track campaign results and report success

# YOUR CAMPAIGN CHECKLIST

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- Meet with your Donor Relations Representative from United Way of North Idaho.
- Attend Campaign Leader Training.
- Secure CEO/Senior Management endorsement.
- Recruit a campaign team comprised of representatives from all departments.
- Recruit a Leadership Giving (\$500+) representative or team.
- Review campaign history and set dollar, participation and awareness goals.
- Confirm campaign budget.
- Determine campaign theme, incentives, and promotion plan.
- Confirm dates and key details for your campaign kickoff and other important activities (time, location, speakers, food, activities, etc.)
- Schedule the use of the United Way of North Idaho campaign video.
- Share campaign details, including goals and strategies, with CEO and management.
- Conduct campaign team training in partnership with your UWNI staff.
- Identify prospective Leadership Giving contributors.
- Start Leadership Giving campaign.
- Prepare contribution forms and materials as needed.
- Begin promoting campaign at least 1 week before your kickoff.
- Campaign Kickoff. If an event, remember to take photos and share! We may choose to feature your company on the United Way of North Idaho's Facebook Page.
- Hand out pledge forms and provide information about giving. Get help from your campaign team!
- Schedule mid-campaign team meeting to review your results so far and finalize all remaining details.
- Send follow-up emails to remind employees about community needs and upcoming campaign activities. Find initiative facts, success stories, and other information at [UnitedWayofNorthIdaho.org](http://UnitedWayofNorthIdaho.org).
- Conduct rallies, group meetings and/or special events. Remember to include community speakers, interactive activities, games and/or prizes.
- Send a reminder about campaign close.
- Collect all contribution forms and submit report envelope(s), asking your Donor Relations Representative for help as needed.
- Remember to provide the names of your Leadership contributors so they can be recognized.
- Submit contribution forms/data to your human resources team.
- Remember to make your corporate gift. Our staff can help you identify customized giving opportunities that match your organization's charitable giving objectives. Ask UWNI staff for more information.
- Hold a celebration event to thank all employees and announce campaign results.
- Thank contributors, Leadership contributors, campaign team and any other key supporters and volunteers.
- Include campaign results and photos in your newsletter or on your website.
- Meet with your campaign team to collect feedback for next year.
- Select next year's Campaign Leader and kickoff date and provide information to UWNI staff.
- Provide feedback to UWNI staff and let us know how we can better help you!

# United Way of North Idaho

## 8 STEPS TO A SUCCESSFUL WORKPLACE CAMPAIGN

Follow the “8 Steps” and you have a greater chance of achieving your campaign goals. CEO support and employee meetings, steps 1 and 6, are a priority. The graphs show how each step contributes to your success.

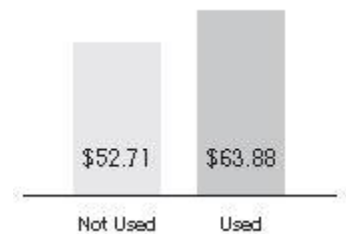


### 1. CEO Support and Involvement

- Pledge a company gift
- Commit to holding employee meeting(s)
- Conduct an executive briefing
- Visibly and actively support the campaign
- Pledge a personal Leadership gift

### 2. Recruit a Capable, Committed Employee Campaign Manager and Committee

- Include one person from each department on your committee. Involve Leadership Givers and Labor representatives, if applicable.
- Send the Employee Campaign Coordinator and committee to a United Way training session



### 3. Set an Aggressive Campaign Goal/ Track Results

- Analyze past performance (if applicable)
- Set an ambitious goal that stretches your team. Goals can include total dollars raised, percent participation and/or Leadership Giving goals.
- Advertise goal internally
- Track and report progress



#### Campaign Goal Setting Worksheet:

A workplace goal provides an incentive to give and measure success. Every year, each campaign company should strive to improve their campaign. To that end, set a workplace goal to encourage increases in giving and/or participation.

Calculate your company's total giving potential by using one of the following formulas:

\$ \_\_\_\_\_ (total payroll) x 0.01 = \_\_\_\_\_ (giving potential)

\$ \_\_\_\_\_ (average annual wage) x 0.01 x \_\_\_\_\_ (number of employees) = \_\_\_\_\_ (giving potential)

Then, evaluate your potential to recent years giving and set goals:

\_\_\_\_\_ (# donors last year) / \_\_\_\_\_ (# employees) = \_\_\_\_\_ % of participation. Goal: \_\_\_\_\_ %

\$ \_\_\_\_\_ (last year's campaign) / \$ \_\_\_\_\_ (your giving potential) = \_\_\_\_\_ %.  
Goal: \_\_\_\_\_ %

#### 4. Work with us to Develop a Campaign Plan

- Meet with United Way to plan an "8 Steps" campaign
- Use United Way campaign materials
- Secure resources for the campaign
- Plan fun! How does your company LIVE UNITED?



#### 5. Conduct a Leadership Giving Program

- Conduct a Leadership Giving meeting
- Set specific Leadership Giving goals
- Hold special meetings to ask for leadership gifts
- Ask senior management to be Leadership Givers
- Discuss Leadership Giving at all employee meetings
- Provide special recognition for Leadership Givers

#### 6. Hold Meetings for All Employees

- Schedule 30-minute meetings to reach all workers
- Invite a United Way representative
- Personalize pledge forms
- Ask all employees to return pledge forms, regardless of whether they donated
- Follow up with all employees
- Discuss Leadership Giving



#### 7. Promote, Inform and Have Fun!

- Build United Way awareness
- Publicize campaign events
- Promote LIVE UNITED, giving, advocating and volunteering
- Participate in Day of Caring
- Ask employees to share personal experiences
- Have fun!

#### 8. Thank, Recognize and Report

- Have your CEO thank all donors including Leadership Givers
- Report results to United Way and employees
- Post internal thank-you messages: signs, articles, and banners
- Conduct campaign debrief with United Way and campaign committee
- Attend United Way Awards Luncheon



#### 8 Steps Not Used vs Used

Comparative data on employee per capita results from the top 150 United Way Campaigns. Ensuring CEO involvement (1) and holding employee meetings (6) are essential to the success of the other 6 steps.

#### Per Capita Results



# THEMES AND FUN IDEAS FOR YOUR CAMPAIGN

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## Iron Chef

Give your company's gourmets a chance to show off. Host a cooking competition, and ask participants to bring a Crockpot filled with their favorite recipes to be judged by a panel of judges.

## Reality Campaign

Get "real" with your employees and host a campaign with a theme centered on Reality TV. Activities might include a "Who Wants to Be a Millionaire" trivia contest, a "Survivor" obstacle course, an "Amazing Race" scavenger hunt, or predictions for who will win the "American Idol" contest.

## Book, Music and Video Sale

Have employees donate books, CDs, videos, or DVDs for a company or department-wide sale, with proceeds earmarked for United Way of North Idaho.

## Back to School

Collect school supplies for a United Way of North Idaho partner. Hold a spelling bee or email community pop quizzes to employees and award prizes.

## Ice Cream Social

Set up an ice cream bar with a variety of favorite toppings. Make it a fundraiser by charging a dollar a scoop.

## Team Spirit Tailgate

Invite employees to wear their favorite team gear on a Friday. Host a "Tailgate Party" during the lunch hour asking employees to bring their favorite dish to share. Host a sports trivia contest.

## Executive Chair or Tricycle Race

Set up an office relay course for participants to go through, either sitting in a chair or on tricycles. Let employees "bet" on their favorite contestants to win.

## Waffle/Pancake Breakfast

Sell tickets and have people sign-up for their choice of pancakes or waffles. Cook breakfast in your company cafeteria and have each department donate a topping. Include a raffle with prizes like lunch with the CEO, coffee and newspaper delivery for a week, a vacation day, or casual dress day.

## Auction Hotline

Invite employees, vendors and local businesses to contribute items for an auction. Set up a special voice mailbox or web page with weekly messages announcing auction items. Update the recorded message daily, announcing the highest bids received to date. Each Friday announce auction results for the week and next week's items.

# FREQUENTLY ASKED QUESTIONS

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## General Questions

### Why should I donate to United Way of North Idaho (UWNI)?

- Because of our collaborations, and the connected nature of our four impact areas (Education, Income, Health and Basic Needs), UWNI is positioned to understand the most pressing needs and provide solutions that benefit the whole community.
- UWNI is proud of our open and competitive application process for funding in our four impact areas, providing funding for 22 programs. This way you know your dollars are being leveraged with others in our community to make real and lasting positive change.
- UWNI has the capacity to serve as an agent for change by working to provide long-term solutions.
- UWNI can leverage your gift through tax credits and, in some cases, federal and state matching dollars.
- UWNI holds itself and our funded community partners to a high degree of accountability to ensure your gift is used efficiently.

In addition to our high level of accountability and open process, we also believe in the power of philanthropy across all nonprofits and missions.

### How is United Way of North Idaho held accountable?

The most valuable asset we have is the trust and confidence people have in our ability to meet community needs. We are audited each year by an independent accounting firm to ensure we are in compliance with generally accepted accounting procedures, regulations, and laws. Also, our Community Impact Councils regularly evaluate the current needs of the community through research, reporting and conversations. This ensures our investments are made only where the greatest impact can be made.

### Why should I support the United Way instead of giving to agencies directly?

The stability and strength of our community depends on our ability to meet people's needs and to encourage their self-sufficiency. The scope of problems such as access to health care and homelessness are so great that no one agency can solve them alone. That's why the best investment in our community is made through United Way. Through the United Way we can mobilize many individuals, agencies and resources to tackle some of our community's toughest problems.

### How much of a donation will make a difference?

UWNI and our community appreciate each person making a gift based on his or her income and financial situation. Many donors give a percentage of their income, anywhere from 1% to 10%, or may choose to give one to two hours per paycheck. Your financial contribution is a personal decision and even a small amount can make a big difference in another individual or family's life.

Another way to give is to donate your time. UWNI is pleased to provide volunteer opportunities with our many Community Impact Partners to employees of our corporate partners and our individual donors.

### I do not believe in giving money to those who are not trying to improve their situation in life, such as drug and alcohol abusers.

United Way of North Idaho's core initiatives support projects and programs that ensure we create self-sufficiency by giving a hand up, not a handout. Our work focuses on long-term systemic change instead of a band-aid approach. Also, our partner agencies provide detailed reporting to ensure minimal repeat use and show processes make a difference in people lives.

### Is United Way of North Idaho in compliance with The USA Patriot Act?

The USA Patriot Act is an Act of Congress that was signed into law by President George Bush on October 26, 2001 to aid law enforcement in the battle against terrorism. United Way of North Idaho is in full compliance with this act. United Way of North Idaho requires agencies receiving funds to certify that United Way funds will be used in compliance with applicable anti-terrorist financing and asset control laws. We recommend that you access CRS Report for Congress or USA PATRIOT Act to get more information.

### **How can I contact United Way of North Idaho about helping someone I know?**

The State of Idaho manages the 2-1-1 CareLine which can be reached by simply dialing 2-1-1 or visiting their website at [211.idaho.gov](http://211.idaho.gov) to search local services. The North Idaho Family Group online Services Directory is a great local resource as well and can be found at <http://niservicesdirectory.com>. United Way of North Idaho can also connect you to many local community resources. Contact the office at (208) 667-8112. The office will connect you with the correct resources to help.

### **What if I make a mistake and want to change my gift once I submitted my donation?**

Not a problem. Simply ask your company's payroll manager and they will assist you with the change. Or if you are not giving through a workplace campaign, contact the UWNI office at (208) 667-8112 or [info@UnitedWayofNorthIdaho.org](mailto:info@UnitedWayofNorthIdaho.org)

## **Accounting Questions**

### **What is the difference between a gift to United Way of North Idaho and a designated gift to an agency?**

Designations to nonprofit agencies is a service we provide to employees of our workplace campaign company partners. However, gifts to UWNI helps minimize working in silos and increases the impact on the overall well-being of our community by investing in areas for the greatest return on your investment. With the over 50 years of experience in the North Idaho, UWNI has a unique perspective, by working with community partner agencies, in understanding the needs of our community. By giving directly to UWNI, we can use the experience and relationships to direct funds where they can have the greatest impact in your community.

### **What agencies can I give to? Can I give to more than one agency?**

You can donate to agencies that hold a valid 501(c)3 certificate or to any agency that qualifies to receive charitable funds as defined by the IRS.

### **Do you release my personal information to my designated agency (ies)?**

It depends. UWNI shares your information with your designated agency so they can thank you for your gift, unless you indicate that you wish to remain anonymous. If you did not elect to remain anonymous, your name, mailing address, and company are provided.

There are employers that do not share employee information with UWNI, in which case UWNI is unable to share employee information with the designated agency. Please check with your Workforce Campaign Leader for the policies of your employer.

### **How do I check status and/or verify if my designated agency has been paid?**

Try checking with the agency first. Designated agencies receive the information of all of their donors so that they can thank you for your gift, unless you indicate that you wish to remain anonymous. Or, at any time, you can receive information on the status of your gift by contacting UWNI at (208) 667-8112 or [info@UnitedWayofNorthIdaho.org](mailto:info@UnitedWayofNorthIdaho.org)

### **Are there designation fees associated with my gift to a 501(c) 3?**

Gifts to UWNI CCF Funded Agencies are not charged an administrative fee. Other 501c3 nonprofit organizations will be charged a nominal 8% administrative fee. Our corporate champions cover a majority of our administrative costs so more of every donated dollar helps to directly improve lives.

### **Where can I see the list of United Way of North Idaho funded agencies?**

If you would like to know what programs are funded through the United Way Community Care Fund, please visit our website at [www.UnitedWayofNorthIdaho.org](http://www.UnitedWayofNorthIdaho.org).

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