

HOW TO RUN A GREAT UNITED WAY CAMPAIGN



Lycoming County United Way

One West Third Street Suite 208
Williamsport, Pennsylvania 17701
570.323.9448
LCUW.ORG



**Lycoming County
United Way**

SERVING LYCOMING, SULLIVAN
& TIOGA COUNTIES

WELCOME!

THANK YOU for serving as the Lycoming County United Way Employee Campaign Coordinator at your workplace and joining our fight for the health, education, and financial stability of every person in Lycoming, Sullivan, and Tioga counties. You'll be your organization's main liaison to United Way for our annual campaign in your workplace.

This handbook is your basic guide for how to **PREPARE, PLAN, CONDUCT**, and **CONCLUDE** your company's campaign. Enclosed are many ideas, strategies, and resources to help make your campaign a success. And remember, United Way staff and Campaign Coordinators are here to help in any way we can.

Your role is critical and far-reaching, with the potential to impact thousands of lives in our community. You'll have an opportunity to showcase your leadership and project management skills at work, build camaraderie within your office, network with colleagues in other industries, and have fun! All while helping us raise charitable dollars to achieve your company's philanthropic goals and further United Way's mission. We appreciate your gifts of time and talent!

YOUR LYCOMING COUNTY UNITED WAY SUPPORT STAFF

RON FRICK	PRESIDENT & CEO	RFRICK@LCUW.ORG	570-666-4382
MELYSSA MCHALE	RESOURCE DEVELOPMENT MANAGER	MMCHALE@LCUW.ORG	570-666-4379
CORINNE STAMMEL-DEMMIEN	RESOURCE DEVELOPMENT MANAGER	CSTAMMEL@LCUW.ORG	570-666-4380
MEL SCAIFE	BUSINESS MANAGER	MSCAIFE@LCUW.ORG	570-666-4383

CONTENTS

Program Partners	3
Campaign Structure	4
Key Roles.	5
Running a Workplace Campaign.....	6-7
Sample Rally Agenda.	8
Make it Fun!	9
Pledging Information	10
Leadership Giving.....	11
Resources and Materials.....	12
FAQS.....	13

PROGRAM PARTNERS

Every dollar given to Lycoming County United Way is multiplied through a collaborative effort that unites our community in the fight for the health, education, and financial stability of every person in every community. Thanks to the support of thousands of generous individuals, companies and foundations, Lycoming County United Way invests in these program partners who are working together to change lives.

LYCOMING COUNTY:

American Rescue Workers - Comprehensive Emergency Assistance Program
 American Rescue Workers - Saving Grace Shelter
 Diakon Family Life Services - Counseling Services
 Family Promise of Lycoming County - Rent Match Program
 Journey House - Transitional Housing
 North Central Sight Services - Prevention of Blindness
 North Central Sight Services - Social Services
 River Valley Health & Dental Center - Next Stop Oral Health Program
 River Valley Regional YMCA - Jersey Shore Brick House Youth Program
 River Valley Regional YMCA - Williamsport Childcare Program
 Shepherd of the Streets - Oral Surgery Assistance Program
 Sojourner Truth Ministries - Feeding Program
 Susquehanna Valley CASA Voices for Children - Volunteer Recruitment UPMC Susquehanna Home Care & Hospice
 YWCA of Northcentral Pennsylvania - Liberty House
 YWCA of Northcentral Pennsylvania - Wise Options

OUTREACH:

American Red Cross NCPA - Disaster Services Emergency Assistance Program
 American Red Cross NCPA - Service to the Armed Forces
 Central Pennsylvania Food Bank - Food Distribution Center
 East Lycoming School District - School Health Outreach
 Hughesville Area Public Library - Summer Reading Program
 Jersey Shore Public Library - Summer Reading Program
 Montgomery Area School District - School Health Outreach
 Montgomery Public Library - Summer Reading Program
 Muncy Area School District - School Health Outreach
 Muncy Public Library - Summer Reading Program
 W.B. Konkle Memorial Library - Summer Reading Program

SULLIVAN COUNTY:

Sullivan County 4-H - Camp Scholarship Program
 Sullivan County Action - Dental Sliding Scale Program
 Sullivan County Library - Community Services Programs

TIOGA COUNTY:

American Red Cross - Emergency Preparedness, Response & Recovery
 B/S/S/T Area on Aging - Foster Grandparent Program
 Big Brothers Big Sisters - Mentoring Program
 Tioga County 4-H - Camp Scholarship Program
 Tioga County Partnership for Community Health - Health Literacy Program
 Tioga County Special Olympics - Spring Track and Field
 Wellsboro Area Food Pantry - Summer Lunch Box Program
 Wellsboro Montessori Children's Center - Summer Music Enrichment



CAMPAIGN STRUCTURE



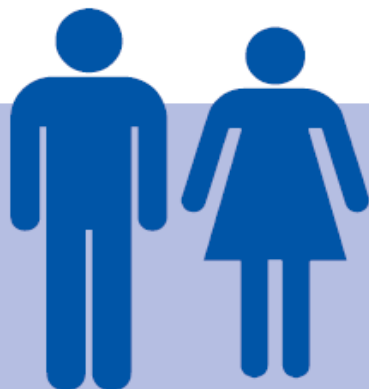
VOLUNTEER-LED CAMPAIGN CABINET

Teams of volunteer community leaders help Lycoming County United Way chart its course for achieving its goals in its focus areas of Health, Education, and Financial Stability.



UNITED WAY STAFF

United Way staff and Campaign Coordinator provide direct support for employee campaign chairs.



EMPLOYEE CAMPAIGN COORDINATOR

The Employee Campaign Coordinator (ECC) is the centerpiece of the workplace campaign. Supported by United Way staff and Campaign Ambassadors, the ECC leads efforts for giving, advocacy, and volunteerism within the company's campaign.

COMPANY EMPLOYEES

Inspired by the ECC and Campaign Teams, employees become donors, advocates, and volunteers for the Lycoming County United Way

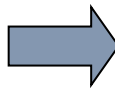


KEY ROLES

CEO/SENIOR LEADERSHIP

- Engages with President and Lycoming County United Way staff.
- Keeps employees informed year round about opportunities to learn more about the United Way.
- Assists their companies with planning and executing United Way campaigns
- Personally supports the United Way and its mission and encourages others to do the same.

CAMPAIGN AMBASSADOR



- Campaign Ambassadors (CA) are the liaisons between United Way and Employee Campaign Coordinators (ECC).
- Assists ECC with campaign management.
- Provides resources and delivers materials, if necessary.
- Attends campaign events.
- Provides guidance.
- Helps wrap up the campaign and picks up pledge forms, and any unused materials.

EMPLOYEE CAMPAIGN COORDINATOR (ECC)

- Your organization's essential point of contact between your organization and Lycoming County United Way.
- Is an in-house leader.
- Knows how best to incorporate the campaign into organizational culture.
- Assembles and manages the organization's campaign team.
- Tracks campaign progress, and keeps the CEO and senior leadership informed.

CA Responsibilities:

Create long lasting relationships.

We know that asking for a donation can be stressful, but starting a conversation is the first step.

During a conversation with the Employee Campaign Coordinator (ECC), you can establish how much follow up will be necessary. Some managers have done this for multiple years and know their role, others need a new perspective, and some need help from the ground up. The ECC distributes materials to employees and discusses when these things need to be returned. It is our job to make sure the employees know why we need them to give. This can be done with speakers from our program partners, speakers from the staff, and of course you.

RUNNING A WORKPLACE CAMPAIGN

As the Employee Campaign Coordinator (ECC) for your organization, you—and the co-worker team you assemble—are the centerpiece of your United Way campaign. You will make a difference in Lycoming, Sullivan, and Tioga counties when you put together an engaging, meaningful, and FUN workplace-centered campaign.

Here's how to get started:

PREPARE

- Learn about Lycoming County United Way (LCUW).
- Attend a Lycoming County United Way Campaign training session to learn how to run a great campaign.
- Get your employees to give via paper pledge form or using your company's process.
- Participate in United Way's visit with your CEO (if applicable) so you are connected to the goals set for your workplace campaign.
- Meet with your CEO to discuss campaign goals, secure his/ her endorsement, request permission to make presentations, offer in house incentives to donors, and confirm a corporate match or gift.
- Meet your Campaign Ambassador (CA) to discuss how they can help support you and your company's campaign. They can get you marketing materials and set up speakers.
- Analyze the previous year's campaign results.
- Set new goals, timelines and strategies, including goals for total donations, participation levels, special event dollars raised, and other measures of success.

PLAN

- Engage LCUW staff where possible.
- Make your campaign engaging by developing a fun theme and tying it back to the United Way's mission.
- Develop leadership giving strategies to encourage donors to join the Tocqueville Society, or Peter Herdic Society.
- Review campaign materials and other resources by talking with your Campaign Ambassador.
- Set a rally schedule and invite your CA.
- Plan and schedule special events and fundraisers for employees.
- Consider running a raffle to engage your co-workers while raising additional funds for the campaign.
- Meet periodically with your CA to review planning decisions and when your campaign has ended.



CONDUCT

- Educate employees by promoting the United Way official kick-off or have your own campaign kick-off event, presentation rallies, and other special events.
- Send a customized kick-off email to employees.
- Include incentives for attendance, participation, donations, and reaching organizational goals.
- Use a multimedia approach, including emails, videos, voicemails, pay stub inserts posters, and displays--any place that's convenient to reach your co-workers.
- Hold one or more presentation rallies with a CA or other United Way representative to discuss goals and new initiatives.
- Bring employees together for a themed meal or in a small group to discuss supporting the campaign.
- Highlight an organizational spokesperson (CEO, other leadership, or program partner) who can provide a personal story as to why the United Way campaign is important to them.
- Have your CEO encourage others to give because they do.
- Provide campaign handouts to EVERY employee.
- Provide details on different ways they can give.
- Utilize United Way videos, testimonials, and stories.



CONCLUDE

- Consider a final push and close-out strategies to encourage last-minute commitments.
- Always recognize donors, show them the impact of their contribution to the community, and encourage them to stay engaged with United Way efforts.
- Write a thank you message in your organization's newsletter.
- Send a letter or email from you and your CEO or senior leadership thanking every employee for their contribution.
- Critique and document the campaign to ensure that next year's campaign goes smoothly with your employees and CA's.
- Gather any cash and checks that have not been turned in, and contact your CA to pick up any campaign pledges.
- Develop a year-round United Way program with newsletter articles chronicling community impact, volunteer opportunities and agency tours, orientation sessions for new employees, and more.
- Invite your United Way representative to speak to employees at any time during the year to share success stories and say thank you.



SAMPLE RALLY AGENDA

This sample agenda covers a 15-20 minute rally, but it can be adjusted in any way that best fits your time frame and campaign goals.

Why I Support United Way: 2 minutes

Organization Spokesperson

- Share a story of why you choose to LIVE UNITED
- Might run a United Way or organization-produced video

United Way's Role within the Community: 5-7 minutes

United Way representative

- Talks about what the Lycoming County United Way does

Impact of Contributions: 3-5 minutes

United Way representative

- Tell the United Way story/program
- Highlight real life stories
- Maybe run a United Way video



Recap and Soft Ask: 1-2 minutes

United Way representative

- Ties it all together

Leadership Ask, Next Steps, and Thank You: 3-5 minutes

Organization Spokesperson

- Pledge process (forms or online)
- Recap of last year's campaign
- Goals for this year's campaign
 - Employee campaign
 - Corporate match or contribution
- Participation rewards, raffle drawings, other events that will takeplace
- Thank you!



MAKE IT FUN!

SPECIAL EVENTS

Special events can be used to raise awareness of the campaign and are held as kick-off or wrap-up events. Since these funds come to United Way of Central Iowa anonymously, we cannot recognize individuals or provide tax receipts for special event dollars. Consider holding one or more of the following:

- Bake sales/basket sales/craft sales
- Balloon grams—for \$1, send a thank you/best wishes balloon to fellow employees
- Basket auction—teams create themed baskets that are auctioned
- Book/garage sale—sell donated books/items
- Breakfast or lunch potluck—each person brings a dish and then pays to eat
- Cake walk
- Cake or cookie-decorating contests
- Car wash—senior management washes cars
- Chili cook-off—each person buys a ticket allowing them one vote
- Coin Drop- Employees drop spare change into bottle
- Dress down Day for United Way—“sell” dress down day coupons for a certain dollar amount
- Dunk the CEO or senior leadership
- Golf tournaments
- Ice cream social
- Managers serve breakfast or lunch
- Musical Chairs
- Pizza Party
- Popcorn Sale
- Raffles for donated items
- Silent auction—use email to auction off donated items
- Team/department challenges

INCENTIVES

Many organizations provide incentives tied to their campaign goals. A large budget is not necessary for incentives: There are many free incentives you can offer to employees for participating in the campaign. These items can also be donated and used in silent auctions or raffles.

- Chair massages
- Challenges among departments
- Company gear and logo items
- Early-out passes
- Free lunch passes
- Gift cards—retail, gas, oil change, etc.
- Honor wall
- Jeans/casual day passes
- Long lunch passes
- Lunch with CEO or senior leadership
- Personal day off
- Raffle tickets for attending campaign events and handing in pledge forms
- Services offered by co-workers, such as baby sitting, auto repair, piano or golf lessons
- Sleep-in passes
- Tickets to a cultural event
- Tickets to a sporting event
- Weekend at vacation home/unused time share



PLEDGING INFORMATION

Employee Campaign Coordinators will receive an email including a PDF of the pledge form, campaign brochure, and campaign ambassador contact information.

- You can choose to print the attached PDF and distribute to your employee or email the form to them. Please be sure to collect once your campaign has finished. Contact your Campaign Ambassador to pick up, or please call our office.
 - Here are the four options to give on the pledge form:
 1. Payroll Deduction
 2. Direct Payment
 3. Credit Card
 4. Direct Billing

SAMPLE EMAIL: You can use and edit the sample email below in any way to fit your personal needs. This is simply a sample way to communicate with your employees to encourage them to give.

Dear Colleagues (OR PERSONALIZE),

Please mark your calendars for (DATE) – our official Lycoming County United Way campaign kick-off! I have the privilege of serving as our Employee Campaign Coordinator.

This campaign is our opportunity to improve the lives of everyone who calls our community “home.” During the next few weeks, you will learn about how the Lycoming County United Way leads the fight for the health, education, and financial stability of everyone in every community.

(COMPANY NAME’S) contributions go toward achieving results in either Lycoming, Sullivan, or Tioga counties. Please view the list of the Lycoming County United Way partners to see where your donations are making a difference. (INSERT INFORMATION ABOUT THE WAY YOU’D LIKE THEM TO GIVE.)

Please join me in being a hand-raiser for United Way, and giving new opportunity and hope to thousands of people right here in our community. I look forward to showing the Lycoming County that (COMPANY NAME) LIVES UNITED.

Sincerely,
(CEO NAME/ECC)

LEADERSHIP GIVING



TOCQUEVILLE SOCIETY

United Way Worldwide created the Tocqueville Society in 1984 to honor people who have served their communities at extraordinary levels and given immensely of their time, talent, and resources. The name was chosen because of vision of French historian Alexis de Tocqueville who recognized, applauded, and immortalized the voluntary spirit that lives in the hearts of Americans in his early 19th century writings in "Democracy in America."

The Lycoming County United Way Tocqueville Society recognizes individuals or couples contributing \$10,000 or more annually to the campaign. For more information about the benefits and how to get involved, please visit lcuw.org/leadership-giving

Can't contribute \$10,000 in one year? Ask about our Step Up program. You can choose to step up over a three or five year period.



PETER HERDIC SOCIETY

The Peter Herdic Society recognizes community leaders who contribute \$1,000 or more to the annual campaign. Peter Herdic was Williamsport's premier entrepreneur, for whom LCUW's leadership giving program is named, arrived in the city 1853 and soon after began his real estate ventures on farmland west of Hepburn Street. Herdic was already involved in the lumber business and on his way to becoming a millionaire when he build his Fourth Street home.

Can't contribute \$1,000 in one year? Ask about our Step Up program. You can choose to step up over a three or five year period.

RESOURCES AND MATERIALS

Running a United Way campaign in your workplace can be challenging, rewarding, and a great way to bond as a team, while helping improve lives in Lycoming County. Here is a summary of the resources and materials available to you.

Campaign Tips is a brief, high-level list of tips and tricks to get you started.

Impact Flyer details the campaign, our work, and ways to get involved can be requested from your United Way representative. This campaign flyer is a “must-read” for everyone in your organization.

What A Dollar Buys this marketing tool can be customized based on the company or organization. We have facts from our program partners that show the impact based on dollar amounts. (shown below)











Pledge Form plus instructions for how to fill them out are also available.

Sample Communications are pre-written templates to help you craft emails, letters, presentations, etc., for your workplace campaign. Don’t miss a review of these materials to help jump start your campaign.

Videos can make a meaningful impression as they vividly highlight real-life success stories. Choose videos that:

- Give an introduction to United Way and why your pledge matters.
- Provide personal testimonies from clients that have overcome challenges with the help of the United Way.
- Please check out our stories from local clients from our Season of Giving Video Series on YouTube.

WHAT MATTERS MORE?

	One \$1 candy bar per week	OR		Supplies over 500 canned good items to families suffering from food insecurity through help at the American Rescue Workers' CEAP Program.
	One \$5 cup of coffee per week	OR		Allows Sheperd of the Streets funds to provide a client in need of surgical removal of two erupted teeth.
	One \$10 lunch out per week	OR		Fully furnishes an apartment for a homeless family including bedroom, dining room, kitchenware and living room furniture which they take with them upon completion of the program at Journey House.
	One \$20 pair of movie tickets per week	OR		Supplies a year long scholarship for a child to attend preschool at the YMCA.
	One \$50 dinner out per week	OR		Allows North Central Sight Services ability to provide 100 pairs of prescription eye glasses for income eligible individuals.

FAQS

Q) What is the Lycoming County United Way (LCUW)?

A) We are a charitable, registered 501 (c) (3) non-profit organization that mobilizes community resources to improve lives in Lycoming, Sullivan and Tioga Counties, working in partnership with community agencies which deliver 41 programs.

Q) How many people did the Lycoming County United Way positively impact last year?

A) Together, our organization has positively impacted almost 50,000 people on record from the tri-county area we serve. These numbers have made a greater impact upon strengthening families and communities in need.

Q) How much did the Lycoming County United Way raise during the 2018/2019 campaign?

A) Thanks to caring people like you, our organization raised almost \$1.2 million dollars (\$1,179,364) in donations to be distributed among our 41 program partners in Lycoming, Sullivan and Tioga Counties.

Q) What diverse range of services do LCUW program partners cover and improve lives with?

A) Adult literacy, child advocacy, daycare, counseling services, crisis intervention, dental outreach, disaster relief, domestic violence prevention, emergency services, hunger, homeless shelters, 211 helpline, mental health, military family communications, parenting classes, public safety, reading enrichment programs, and services for those with vision impairments.

Q) Why should I donate to the Lycoming County United Way?

A) Funds raised stay right in the county where they are raised, helping your neighbors in need. Almost 75 community volunteers determine where your investments are needed most each year.

We keep fundraising costs low by leveraging existing community resources. We fund programs, not agencies.

Participating organizations are held accountable for their funds through an evaluation process.

We operate on a system of checks and balances which include site visits, budget reviews, regular reporting, and ongoing evaluation of community needs.

Q) How does Lycoming County United Way know what the community's needs really are?

A) LCUW partners Lycoming College and other community leaders for a regular Community Needs Assessment which takes place every three (3) years. This year we partnered with the First Community Foundation Partnership of Pennsylvania (FCFP), Lycoming-Clinton Counties Commission for Community Action (STEP), Inc. and the River Valley Health & Dental Center. A link to the 2018 survey can be found on this website under the Annual Report tab or at <http://www.stepcorp.org/sites/default/files/CNA-Report-2018-Lycoming-County.pdf>

Q) What is United Way Worldwide (UWW)?

A) UWW is the leadership and support organization for the network of nearly 1,800 community-based and community-led solutions that strengthen the cornerstones for a good quality of life: health, education and financial stability.

- We are ranked as the world's largest privately funded nonprofit organization.
- Our mission is to mobilize the caring power of communities around the world to advance the common good.
- Website: www.unitedway.org

Q) What do I do if I need assistance from a United Way partner?

A) Dialing 2-1-1 or texting your zip code to 898211 will get you a trained resource and referral specialist, who will know what services are available in your area.