

UNITED WAY OF SOUTHWEST VIRGINIA

EMPLOYEE CAMPAIGN LEADERS RESOURCE GUIDE



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THANK YOU FOR YOUR SUPPORT

2020 has brought challenges that have had ripple effects across all corners of Southwest Virginia. And while this year's fundraising campaigns may look a little different, your support is more important than ever. We're looking to you—our strongest and most dedicated supporters—to help share the message of how the work of United Way is crucial.

By becoming an Employee Campaign Manager for your workplace's United Way of Southwest Virginia annual campaign, you're helping to solve some of our community's toughest challenges. It takes a special person to manage a workplace fundraising campaign: a person with leadership skills, creativity, enthusiasm and compassion—a person who believes that together we can create a community where every person has an equal chance at a bright future.

With your help, we can break the cycle of multi-generational poverty; give all kids an equal chance to learn and succeed; meet our neighbors' basic needs; and build strong, healthy communities.

We hope this endeavor makes a difference in your life, as it has for so many others who have taken on this leadership role.

This guidebook is full of ideas and information to help you manage a successful campaign. Remember, your Relations Manager is just a phone call or email away with additional support and direction.

Thank you for making Southwest Virginia a place where every child, individual and family thrives.

With Great Appreciation,

Travis Staton

President and CEO



As an Employee Campaign Leader, your commitment to the United Way campaign creates a lasting impact for a stronger, greater Southwest Virginia community.

THE CAMPAIGN TOOLKIT

The Campaign Toolkit is your toolkit for running an easy and successful campaign, especially if you are running your campaign virtually and participating in our 2020 Rollover Campaign! Start your journey with this virtual toolkit and digital resources to prepare for your kickoff and then check out our campaign materials, videos, slideshow loop for your digital monitors, and more.

CAMPAIGN LEADER TRAINING

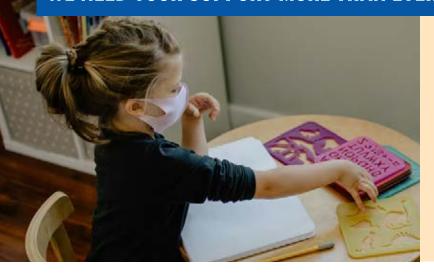
United Way offers training each year for Campaign Leaders to become oriented in best practices. This year we are offering virtual Network Webinar on several dates. During this webinar we will discuss the Rollover Campaign and our digital resources. Each session will last approximately 45 minutes with a question and answer period. Please choose a date below and register for a webinar. Thank you for running your organization's workplace campaign. We are grateful to have you!

To learn more about the digital resources that we have available to help you, please watch a recording of our Campaign Leader training session.

ECL WEBINARS



WE NEED YOUR SUPPORT MORE THAN EVER



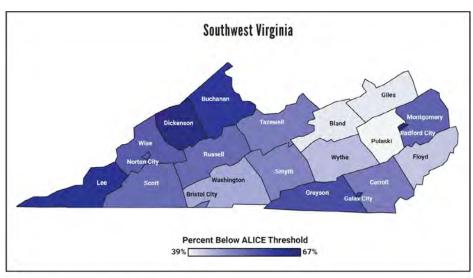
In Southwest Virginia, 51% of households cannot afford basic needs such as housing, child care, food, transportation, health care, and technology. This alarming statistic refers to households defined by United Way as ALICE, which stands for Asset Limited Income Constrained Employed. The COVID-19 crisis has made the situation even worse for these families who are earning, spending, paying taxes, yet still struggling to make ends meet.

Percentage of households with income below the ALICE threshold, Counties and Independent Cities, Southwest Virginia, 2018

The ALICE population represents those of us (men, women, and families) who work hard and earn more than the official Federal Poverty Level, but less than the basic cost of living. You can find these statistics and more for your Southwest Virginia County by visiting our ALICE information page on our website.

The number of children experiencing adverse childhood events is thought to be increasing during the pandemic crisis with more children falling behind in school.

The addiction epidemic has contributed to the already low number of people in Southwest Virginia who participate in the labor force and impacted our economy in Southwest Virginia.



Sources: American Community Survey, 2018; ALICE Threshold, 2018



"Until now, ALICE has been a hidden population. ALICE works, but struggles to afford the basic necessities, including housing, food, child care, health care, and transportation. The issue is that ALICE households often don't qualify for governmental aid or social service programs, and they are virtually invisible to the system. A lot of times, their struggles are unseen and unknown."

UNITED WE CAN



United Way of Southwest Virginia

BREAK THE CYCLE OF POVERTY



GIVE KIDS AN EOUAL CHANCE



BUILD STRONG, HEALTHY COMMUNITIES



EARLY CHILDHOOD



Children are cared for in quality environments, ready for kindergarten, and equipped with skills and support for success

ELEMENTARY



Children are fed, engaged in healthy lifestyles, and reading at grade level by the end of 3rd grade

Service area

MIDDLE SCHOOL



Youth have goals, support, and a plan for the future, basic financial literacy, and knowledge about their health and well-being

HIGH SCHOOL



Youth gain hands-on career experience and complete high school with a plan to enter the workforce or pursue college

BEYOND



Families are healthy, educated, and financially stable members of the workforce

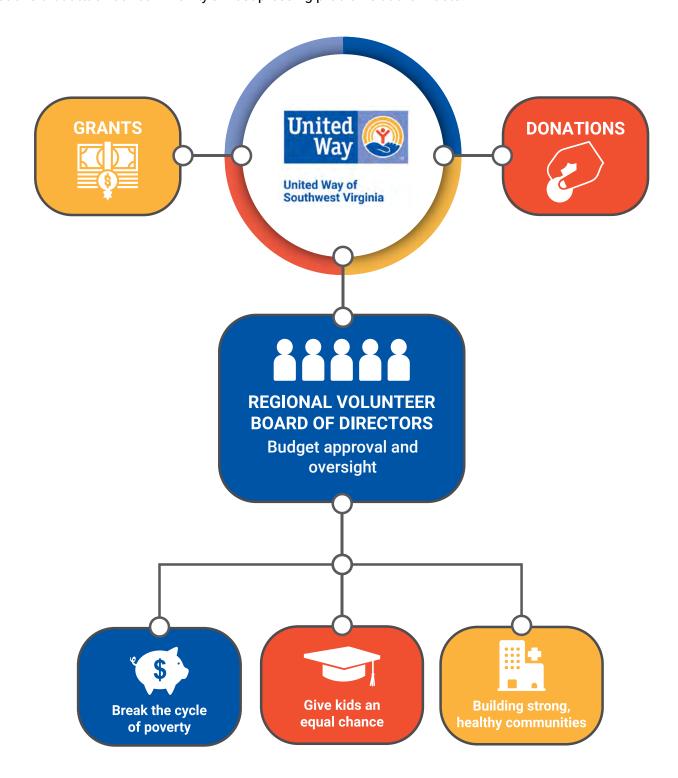
WITH A FOOTPRINT THAT COVERS NEARLY 20% OF THE STATE OF VIRGINIA,

United Way of Southwest Virginia programs and initiatives serve the counties of Bland, Buchanan, Carroll, Dickenson, Floyd, Giles, Grayson, Lee, GILES Montgomery, Pulaski, Russell, Scott, MONTGOMERY BUCHANAN Smyth, Tazewell, Washington, Wise, BLAND TAZEWELL DICKENSON and Wythe, and the cities of **PULASKI** Bristol, Galax, Norton, RUSSELL WYTHE and Radford. SMYTH WASHINGTON **CARROLL** SCOTT LEE GRAYSON

Additional areas in which United Way of Southwest Virginia programs and initiatives are offered

We unite the community, mobilize resources, and create change.

We bring the community together in a way no single organization can to develop, fund and scale collective solutions that attack our community's most pressing problems at their roots.



INVOLVE YOUR WORKPLACE!

For more information on running a workplace campaign please contact donations@unitedwayswva.org or call 276.525.4071



UNITED WE LIFT UP OUR COMMUNITIES.

Every day, communities struggle with issues that seem impossible to solve.

Limited access to health services. Lack of education. Scarcity of affordable childcare. Financial instability.

With your help, we were able to make the following investments in 2020.



INVESTMENT IN COVID-19
RELIEF, FUNDS WERE A LIFELINE
TO THOSE IN NEED



TO PROVIDE FOOD, SHELTER,
TRANSPORTATION,
UTILITY ASSISTANCE, AND
PRESCRIPTION MEDICATIONS



WEEKEND MEALS PROVIDED TO STUDENTS THROUGH OUR BACKPACKS UNITE PROGRAM



\$43,096

GRANT FUNDS REPURPOSED FOR CHILD CARE CENTERS TO OPERATE DURING COVID-19



30,310

STUDENTS
SERVED THROUGH
THE IGNITE PROGRAM



USED TO FILL 311 CHILDCARE
TUITION SLOTS AT 16
PROVIDER LOCATIONS



GALLONS OF HAND SANITIZER FOR CHILDCARE CENTERS AND NON-PROFITS



125,000

MASKS TO CHILD CARE CENTERS, LOCAL SCHOOLS, AND NON-PROFITS



\$55,800

INVESTED IN OVER 30 COMMUNITY HOT-SPOTS

United Way fights for the health, education and financial stability of every person in every community. We have one life. To live better, we must LIVE UNITED®.





WHAT WE'RE UP AGAINST

As the COVID-19 crisis continues, individuals and families are struggling. The economic effects are immense, particularly for those living paycheck to paycheck. Many families still struggling to recover from recent events are finding their path to financial stability even more challenging. Children, single parent families, and senior citizens are particularly vulnerable.



HEALTI

Giving kids an equal chance



EDUCATION

Building strong, healthy communities



FINANCIAL STABILITY

Breaking the cycle of poverty

WHAT IS THE DIFFERENCE IN GIVING TO UNITED WAY VS. ANOTHER CHARITY?

At United Way Southwest Virginia, we bring individuals, businesses, nonprofits and government decision makers together to have the tough conversations, mobilize the resources and make the smart investments, so that every person and every family in our community thrives. We bring the community together in a way no single organization can to develop, fund and scale collective solutions that attack our community's most pressing problems at their roots.

IF I DON'T BENEFIT, WHY SHOULD I GIVE?

With your help, we can break the cycle of multi-generational poverty; give all kids an equal chance to learn and succeed; and build strong, healthy communities. You may even have neighbors or family members who are benefiting from United Way initiatives.

HOW MUCH OF MY GIFT IS USED FOR OVERHEAD?

Our administration rate is 5% and the fundraising rate is 12% which totals to only 17%. The Better Business Bureau recommends a healthy nonprofit have a rate less than 35%. United Way of Southwest Virginia operates at half of that rate, running a lean operation focused on efficiency.

WHO RUNS UNITED WAY?

A volunteer Board of Directors made up of residents throughout Southwest Virginia sets policy and strategic direction, oversees financial practices, and provides guidance on operational issues.

HOW IS MY LOCAL UNITED WAY RELATED TO UNITED WAY WORLDWIDE AND OTHER UNITED WAYS?

United Way Worldwide does not control funding decisions by local United Ways. Actually, United Way Worldwide has no input on how a local United Way invests contributions in its communities. All local funding decisions are made by the individual United Ways with the input of local leaders and community stakeholders.

IS MY GIFT TAX DEDUCTIBLE?

United Way of Southwest Virginia is a nonprofit 501 (c)(3) eligible to receive tax deductible gifts. You should discuss the tax deductibility of your gift with a tax professional.

DOES UNITED WAY OF SOUTHWEST VIRGINIA PROVIDE FINANCIAL SUPPORT OR ANY SERVICES TO PLANNED PARENTHOOD?

No! United Way Southwest Virginia does not currently fund, nor has ever funded, abortion services in our communities.





COVID-19 RESPONSE IN 2020

United Way of Southwest Virginia responded to the needs of our communities experiencing detrimental economic effects related to the COVID-19 pandemic by focusing on our most vulnerable populations including children and families.

DURING THE COVID-19 CRISIS, UNITED WAY PROVIDED:

- \$1,528,100 total investment in COVID-19 relief, these funds were a lifeline to those who found themselves struggling due to loss of jobs or work hours
- \$185,000 to provide food, shelter, transportation, utility assistance and prescription medications
- \$43,096 repurposed grant funds for childcare centers to operate during the COVID-19 crisis
- \$55,800 for approximately 30 community hot-spots for greater Internet service availability
- 2,000 food vouchers for at-risk residents in Southwest Virginia
- 125,000 face masks to child care centers and community action programs throughout Southwest Virginia
- 660 gallons of hand sanitizer to child care centers, social service organizations, and community action programs

FINANCIAL STABILITY- A LOOK BACK AT 2020

- VITA volunteers saved Southwest Virginia tax filers **\$464,250** by preparing their taxes for free
- \$2,507,33 returned to people who filed their taxes with VITA in Southwest Virginia through federal refund
- 1,857 federal returns prepared by VITA volunteers

YOUTH SUCCESS - A LOOK BACK AT 2020

- 30,733 middle and high school students served by the Ignite Program, with a total of 36 completed Ignite Internships
- 93 schools across Southwest Virginia participated in the Ignite Program
- 34 businesses and organizations offered internships through the Ignite Program
- 103 local employers partnered with the Ignite Program
- 4,480 middle school- aged students attended the Careers Expo for Youth
- 84 educators went on the Educators in Industry tours

CHILDHOOD SUCCESS - A LOOK BACK AT 2020

- \$433,600 used to fill 311 childcare tuition slots at 16 provider locations through the CARES Act
- 480 hours of coaching provided to 12 childcare providers through the Virginia Infant and Toddler Specialist Network
- 750 participating Virginia Quality educators in Southwest Virginia classrooms
- 120 participating Virginia Quality centers
- 3,194 children were served by participating Virginia Quality providers
- 117 classrooms observed using the Teachstone CLASS assessment tool
- 251,424 weekend meals provided to students through our Backpacks Unite program
- 1,092 children in schools across Southwest Virginia currently receive weekend meals through Backpacks Unite
- 34 local schools are participating in United Way of Southwest Virginia's Backpacks Unite program
- \$216 provides a child with nutritious meals every weekend for 36 weeks (school calendar)



2021 ROLLOVER CAMPAIGN PURPOSE

Your support for United Way of Southwest Virginia funds early education, social and emotional health, financial stability services, and disaster relief for children, families, and individuals in our local community. Below is more information about implementing a continuous rollover campaign this year to help our community today and into the future.

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and billing) from 2020's annual campaign and automatically rolls it over to the 2021 campaign including gift amount, type of pledge and any designations, unless any changes are specified by the employee. Any gifts that were made via cash, check or credit card are not eligible for rollover and would need to be made by the employee as a new gift. Any employee always has the option to make changes to their gift including an increase, decrease or other adjustment based on their personal situation.

WHAT STEPS ARE INVOLVED?

- 1. Complete and submit the confirmation form. On the next page is a form to provide us with all the details needed to get started.
- 2. Define your timeline for when you want to run your campaign. This looks a lot different than a traditional campaign. Right before your campaign, you'll need to communicate to your employees the details and how they can adjust. We recommend about two weeks for notification of adjustments to their gift including designations or to increase giving.
- **3. Determine a point person** for employees to contact regarding changes to their gifts or renewals for cash, check or credit card gifts.
- **4. Reach out to new employees** that have joined since the end of your 2020 campaign. Provide new staff with a United Way packet including a pledge form.
- **5. Submit pledge forms** to your United Way contact for any new employees or changes for existing donors at the end of your campaign.

WHAT TOOLS CAN UNITED WAY PROVIDE?

2020 Donor Information: We can provide a spreadsheet with the details of your 2020 giving including donor name, amount and designations for ease of answering employee questions.

Communication Plan: We will provide sample communications to help you inform your employees about the campaign as well as answer questions that might come up.



ROLLOVER CAMPAIGN CONFIRMATION

Our company/organization will implement a Rollover Campaign for the 2021 Annual Campaign. We understand that this means all employee payroll pledges submitted for the 2020 will be continued flat for 2021, including designations, unless otherwise notified by the donor of any changes.

COMPANY/ORGANIZATION NAME:			
EMPLOYEE CAMPAIGN CONTACT:			
EMAIL:	PHONE:		
SIGNATURE:	DATE:		
CAMPAIGN DATES:			
Will the company be providing incentives or matching gifts?	Yes	N	10
If so, please describe:			

Please return confirmation form to donations@unitedwayswva.org

Location:

United Way of Southwest Virginia 1096 Old Berry Drive Abingdon, VA 24210 (276) 525-4071

Mailing Address:

United Way of Southwest Virginia P.O. Box 644 Abingdon, VA 24212 (276) 525-4071







2 MONTHS BEFORE YOUR CAMPAIGN STARTS

- Schedule a planning meeting with a United Way staff member
- Create your campaign committee
- Choose campaign dates
- Plan your kickoff and fundraising events

1 MONTH BEFORE YOUR CAMPAIGN STARTS

- Hold a meeting with your leadership team to get their support and participation in events
- Share campaign dates and theme with staff
- Schedule a speaker for your kickoff event (through your Relations Manager)

CAMPAIGN LAUNCH AND UP TO 2 WEEKS PRELAUNCH

- Post campaign collateral (posters, flyers, one-pagers, etc.) in newsletters, emails or your intranet
- Send pre-campaign launch and campaign launch letters (provided by United Way or customized) via email, intranet, newsletter or all of the above; include video where applicable
- Hold your kickoff meeting and share campaign video
- Send emails directing employees to company pledge site

2 WEEKS TO 1 MONTH AFTER CAMPAIGN

- Send thank you letter, along with results, to all donors
- · Conduct final audit with United Way staff member





YOU RAISE MONEY WHEN YOU ASK FOR IT. Remember, you are providing the opportunity to make a difference and be part of a group of people committed to changing our community for the better. Don't be afraid to ask. Your focus is on people helping people. The most successful workplace campaigns have the early and full support of the company's CEO.

SET A CAMPAIGN GOAL

- 1 Prior to beginning your campaign, meet with your CEO and other top executives within the organization.
- (2) Establish a timeline and budget with CEO feedback.
- Ask your CEO to send personal correspondence (i.e. letter, email, payroll insert, etc.) to each employee asking for campaign support and contribution. United Way provides customizable templates.
- 4 Arrange for your CEO to speak at your campaign kickoff celebration.
- (5) Ask your CEO and other top executives to be present at campaign meetings and attend campaign activities.
- 6 Ask your CEO and other executives to join you in kicking off the campaign by making the first leadership pledge.

SETTING YOUR GOAL

A workplace goal provides an incentive to give and measure success. Set a workplace goal to encourage an increase in giving year over year. The worksheet included here can help you calculate your company's investment potential.



CAMPAIGN RESOURCES AND LINKS

Provide employees with additional information about United Way through printed materials or other employee communication methods (text notifications, emails, bulletin boards, digital slideshow, message boards, etc.)

Share United Way videos, flyers, and Impact Stories through text communications or email during the campaign.

- Campaign Checklist pg 16
- Campaign Flyer
- Digital Banners
- Digital Slideshow
- Impact Stories
- Frequently Asked Questions
- Pledge Form
- Posters
- Program List
- Rollover Confirmation Form
- Sample letters from CEO to Employees
- Sample Emails to Managers/Supervisors
- Sample Text Messages to Employees
- Talking Points
- Video links





ONE-TIME GIFT DONATION INSTRUCTIONS

ONE-TIME GIFT DONATIONS

One-time gifts for the workplace campaign will need to be handled separately from the rollover campaign. Cash and credit card donation instructions or listed below.

CASH DONATIONS

Employees wishing to make a cash donation will need to fill out a pledge form to hand in with the cash. This donation will need to be taken to the designated campaign leader or HR contact.

If you are having a competition between departments, cash donations could be kept in a donation container placed in each department to be added to payroll deduction totals for that department. Any employee contributing cash, could provide the shift manager with their form when adding money to the container.

CREDIT CARD DONATIONS

Employees that want to make a one-time donation using their credit card, will need to visit our website at **https://unitedwayswva.org/** and click the big red donate button at the top right of the screen.

QUESTIONS?

If you have any questions or suggestions regarding one-time donations, please contact donations@unitedwayswva.org.



INCLUDING NEW HIRES IN YOUR CAMPAIGN

Your donation to United Way of Southwest Virginia helps provide food for at-risk students, childhood education programs, and financial stability in our local communities.

THE BEST WAY TO INCLUDE NEW HIRES

- Confirm with your company's HR payroll, that new employees can sign up for payroll deduction donations and when those new donations will start being deducted.
- 2. Determine the best way to capture employee pledges. Ask United Way for paper pledge forms, digital pledge forms, or request an online pledge site that can be open all year.
- **3.** In your new employee welcome packet or emails include information about United Way such as:
 - **a.** Include a link to allow employees to sign up easily or include a paper pledge form.
 - United Way campaign flyers and materials (can be downloaded from the Campaign Toolkit on our website or requested from your United Way of Southwest Virginia contact)
 - **c.** A letter from the CEO inviting employees to give and how your company supports community giving.
- 4. During employee orientations, show United Way videos or allow the campaign leader or other company leadership to explain why your company supports the community. Be sure to point out materials in the packet and how employees can sign up to give.
- Create a timeline to follow up with employees after orientation to remind them to sign up by a certain time.
- 6. Provide both your HR/payroll team and United Way with an updated spreadsheet for Rollover Payroll Deductions and pledge forms new employees filled out. Please discuss with your United Way rep the timeline to review these pledges and send them to your company payroll.
- 7. Thank your employees for participating.



How are your donations used?

100% of your donations to United Way of Southwest Virginia goes directly to support local programs in the region.

Share resources

Visit our website to share resources about how United Way and employee donations make a difference.

Click the links below to see a few of our favorites!

- Campaign Video
- Continuous Giving With a Rollover Campaign refer to page 9 and 10
- Digital Slideshow
- Strategies for success refer to page 12
- Impact Stories
 - Backpacks Unite
 - CARES funding
 - Careers Expo for Youth
- Infographic
- One-Time Gift Donations refer to page 14
- <u>UWSWVA Program List</u>
- UWSWVA 2021 Campaign Flyer





 Meet with United Way staff member for a planning meeting
 Obtain CEO endorsement and support
 Set-up campaign dates
 Schedule Leadership Meeting with Managers/Supervisors/Shift Managers
 Schedule CEO to speak at the Leadership meeting endorsing United Way of Southwest Virginia giving and asking Leadership to give
 Schedule your United Way of Southwest Virginia representative to speak to Leadership in person, via webinar, or to provide a pre-recorded video with talking points
 Set campaign goal
 Get CEO to send messages to employees via email, text notifications, and memos endorsing United Way of Southwest Virginia giving (samples provided)
 Provide Manager/Supervisors with Rollover Campaign instructions, questions and answers, and flyers
 Send emails and text notifications reminding Managers and Employees of the event date(s)
 Post flyers on bulletin boards, upload digital slideshow to your break room monitors
 Provide New Hires with Information Package and Pledge Form
Wrap up campaign! (Check next sheet for details)





THE END OF YOUR CAMPAIGN IS A TIME TO CELEBRATE YOUR ACHIEVEMENT, thank your supporters and set yourself up for success next year. Follow these steps to ensure the perfect wrap:

ADD IT UP

Your Rollover pledge spreadsheets should be updated and a copy of your new hire pledges should be collected and remitted to your payroll department and a copy sent to your United Way Community Relations contact. All cash and checks received through your workplace campaign should be collected, counted, and sent to or picked up by your United Way Community Relations contact.

SAY THANKS

People won't necessarily remember how they were thanked, but they will remember if they were never thanked at all, so it's important to thank your employees and leadership for all they have done to make your campaign a success.

Consider ways to use existing recognition structures within your workplace, as well as formal channels (e.g., emailing certificates to your top givers and publicly recognizing them at your wrap-up event, or publishing their names on your intranet) and informal channels (e.g., a handwritten thank-you note sent by mail to department managers and supervisors, or a phone call top givers), to thank your colleagues.

LOOK AHEAD

After all your hard work, take some time to capture your successes and areas of opportunity for next year.

By recording your efforts and their impact on your campaign, you will be setting up next year's Campaign for success, ensuring your organization and its employees will continue to make a positive impact in your community.

 Collect and return all paper pledge forms
 Update Spreadsheet with 2021 rollover pledges and send to payroll to give to manager
 Complete Campaign Summary Sheet
 Schedule time for Relations Manager to pick up information





VISIT OUR WEBSITE

All campaign materials can be found at https://unitedwayswva.org/campaign-toolkit/

QUESTIONS?

Please contact donations@unitedwayswva.org or call (276) 525-4071.

FOLLOW OUR SOCIAL MEDIA

Stay up-to-date on all our work in the region by following us on Facebook, LinkedIn, Twitter and Instagram!



FACEBOOK



TWITTER



INSTAGRAM



LINKEDIN

