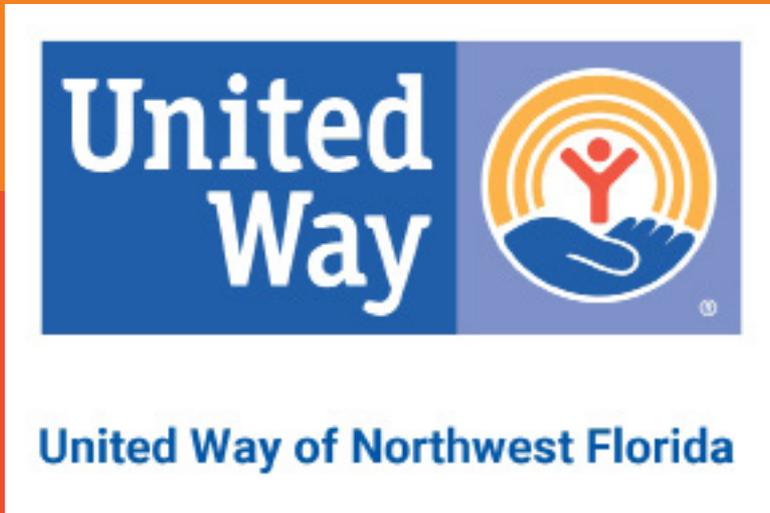


2017 Campaign



SERVING BAY, CALHOUN, GULF, HOLMES, JACKSON, AND WASHINGTON COUNTIES

EMPLOYEE CAMPAIGN COORDINATOR GUIDE

WHAT IS UNITED WAY OF NORTHWEST FLORIDA?

FREQUENTLY ASKED QUESTIONS

1. *What does United Way of Northwest Florida do?*

Established in 1932, United Way of Northwest Florida is a nonprofit, 501(c) 3 agency that partners with nonprofits, businesses, governments, and social service agencies to address the community's most pressing needs. Its primary function is to fundraise for its partner agencies. United Way of Northwest Florida is the premier local workplace campaign fundraising agency for its partner agencies. This is done through local workplace campaigns. By conducting annual workplace campaigns, it can relieve some of the fundraising burden from its partner agencies, allowing them to put their focus on providing community members with the services they need.

2. *Does United Way of Northwest Florida provide any direct services?*

United Way of Northwest Florida's primary function has always been to fundraise for its partner agencies. Campaigns relieve them of some of the burden of fundraising so that they can put their focus on providing local community members with the services they need. While United Way of Northwest Florida does not provide any direct services, it does fund, and assist in the administration of the following programs:

2-1-1 of Northwest Florida: A free, confidential information and referral service that connects callers to information regarding available health and human services. This resource can provide information on housing, food, employment, health care, counseling, and more.

Volunteer Income Tax Assistance (VITA) Program: A free tax preparation service for working families with moderate to low incomes. Every year United Way of Northwest Florida partners with the IRS to train and certify volunteers to prepare and file tax returns. On average, 2,700 tax returns are processed each year, bringing over \$3,000,000 back into the community.

3. *Who is responsible for deciding where the money goes?*

You are the first person that plays a part in deciding who receives funding from United Way of Northwest Florida through your designation. Should you decide to designate your gift to United Way of Northwest Florida, the money is then put in the Community Impact

Fund. Each year, groups of local community members volunteer to be part of the Funds Distribution Committee. This committee meets to review the many grant applications submitted by our partner agencies. This unique process provides quality assurance on behalf of all donors. The volunteers examine each application for need, efficiency, effectiveness, and financial accountability. The volunteers determine the community needs and award grants, through our Community Impact Fund, to the agencies that are best able to serve our local population. Serving as a volunteer on the Funds Distribution Committee is both challenging and rewarding. If you are interested in being on the committee please contact (850) 785-7521.

4. Why should I give to United Way of Northwest Florida rather than directly to an organization of my choice?

There are several compelling reasons why a gift to United Way of Northwest Florida is a benefit to you:

You want your money to go where it will do the most good. Every human service agency relies on other agencies; no agency stands completely alone. United Way of Northwest Florida is the best way to ensure that a complete network of quality human services exists for people who want to change their lives for the better, right here in Northwest Florida.

We live here. We work here. We play here. We want our money to stay here. United Way of Northwest Florida works hard to guarantee that we will do our very best to keep your gift local. Whether you give to United Way of Northwest Florida, our partner agencies, or any 501(c) 3 organization, your money will stay local (unless otherwise requested).

We can make your money grow. Many of our partner agencies apply for grants in which they must have local matching dollars. Dollars used from our Community Impact Grants are then leveraged to the fullest capacity. Here are some examples of how giving directly to United Way of Northwest Florida can make your dollars grow through the Community Impact Fund and matching grants:

Council on Aging: Meals on Wheels	\$1 UW is matched by \$9
Life Management: Adoption/Foster Care Services	\$1 UW is matched by \$25
Early Learning Coalition: School Readiness Program	\$1 UW is matched by \$17

For most of us, giving a large amount of money at one time is not possible. The thought of giving \$1,000 all at once is alarming. Through payroll deduction, you can give a little at a time, which can amount to a lot. Giving does

have mean taking away from you and your family. Payroll deduction is the easiest way to be able to give the most. Once you set up your payroll deduction, you do not have to remember to give each paycheck, it comes out automatically, until it is time to pledge again (annually).

\$1/week = \$52 a year
\$5/week = \$260/year
\$10/week = \$520/year
\$20/week = \$1040/year

5. Is United Way of Northwest Florida part of United Way Worldwide?

United Way Worldwide provides leadership and support for a network of local United Ways worldwide. United Way of Northwest Florida is first and foremost a local independent organization, separately incorporated with our own CEO and Board of Directors. In 1972, we became an affiliate of United Way Worldwide. For a nominal 1% membership fee, we are provided with training opportunities, research information, and national advertising. United Way Worldwide also certifies each United Way for accountability, oversight, and compliance with all membership standards.

6. Why does United Way of Northwest Florida not fund organizations that help animals or the environment?

United Way of Northwest Florida's mission and vision is focused around health and human services. The most common misconception is that you are unable to give to the organization of your choice. Although we are unable to partner with agencies whose mission is not focused around health and human services, as a service to you as the donor, we will gladly forward your gift to any IRS recognized 501(c) 3 organization.

7. Is United Way of Northwest Florida a political organization?

United Way of Northwest Florida is not a political organization. United Way has a responsibility to clearly step away from the political arena. There is a distinct difference between advocating for social change versus evaluating and funding needed critical services. United Way of Northwest Florida's only purpose is to help people. Your tax dollars do not fund United Way of Northwest Florida. V.I.T.A. is the only program that United Way of Northwest Florida has that receives any federal grant assistance.

8. Is my donation tax deductible?

Yes. And even if you don't itemize on your tax return, you can take a deduction.

9. Does United Way of Northwest Florida charge any fees?

We do not charge our partner agencies dues. The only fees withheld from direct designations (donations pledged to specific agencies) are the following:

A three-year average of actual administration expenses and fundraising expenses. United Way of Northwest Florida is currently averaging 20%. GuideStar, BBB Wise Giving Alliance, and Charity Navigator have stated that 30% is the nonprofit industry standard for administrative and fundraising fees. For more information on administrative and fundraising costs, more commonly referred to as “overhead”, visit www.overheadmyth.com to read their letter to donors or non-profits of America.

A three-year average of actual pledge attrition (shrinkage, or pledges made but not paid). United Way of Northwest Florida is currently averaging 9%. We pay our partner agencies based on actual pledges, not actual payments. When an employee stops their pledge payment or moves on to another employer and does not finish paying their pledge, we must account for the dollars we pay out but do not receive.

10. Why should I give? Do I have to give? How much should I give? Can I combine my gift with my spouse/partner?

Giving should always be a personal matter and decision, free from coercion. Whether you have received services in the past, may need them in the future, know of someone who has received services, or just want to help members of your local community, the choice to give is all yours. How much you decide to give is yours to make. Giving one month's pay per month qualifies you as a Care Share giver, 1% of your annual salary makes you a Pacesetter, and giving \$1,000 or more (\$19.23 a week or more) makes you eligible to become a member of our Red Feather Leadership Giving Society. Your pledge can be combined with your spouse or partner, but we need to know their name and employer.

We are always grateful for all gifts. Every cent, dollar, and pledge helps our community and its members reach their full potential. Without you and your gifts, United Way of Northwest Florida and our partner agencies could not address our community's most pressing needs.

*Agencies partnered with United Way of Northwest Florida provide services which grant equal opportunities to all persons regardless of race, color, creed, religion, national origin, gender, age, disability, veteran status, citizenship status, or any other classification that may be protected under the law.

2017 PARTNER **AGENCIES**

- 33 2-1-1 of Northwest Florida
- 01 United Way of Northwest Florida
- 15 United Way of Northwest Florida Community Impact Fund
- 78 America's Second Harvest of the Big Bend
- 03 American Red Cross of Northwest Florida, Central Panhandle
- 13 AMI Kids, Panama City Marine Institute, Inc.
- 61 Anchorage Children's Home of Bay County, Inc.
- 21 ARC of Washington-Holmes Counties, Inc.
- 75 BASIC NWFL, Inc.
- 04 Bay County Council On Aging, Inc.
- 89 Bay Education Foundation, Inc.
- 36 Big Brothers Big Sisters of Northwest Florida, Inc.
- 26 Boy Scouts of America, Alabama/Florida Council, #3
- 05 Boy Scouts of America, Gulf Coast Council, #773
- 06 Boys & Girls Clubs of Bay County, Inc.
- 62 Catholic Charities of Northwest Florida, Inc.
- 63 Chemical Addictions Recovery Effort, Inc.
- 07 Children's Home Society of Florida, Inc., Emerald Coast Division
- 37 Chipola Healthy Start, Inc.
- 77 Covenant Care (Covenant Hospice, Inc.)
- 40 Dancing for Hope, Healing and Health, Inc.
- 08 Early Education & Care, Inc.
- 84 Early Learning Coalition of Northwest Florida, Inc.
- 23 Elder Care Services, Inc.
- 65 Epilepsy Association of the Big Bend, Inc.
- 09 Family Service Agency of Bay County, Inc.
- 83 Feeding the Gulf Coast, Panhandle Branch
- 10 Girl Scouts of the Florida Panhandle, Inc.
- 11 Girls Incorporated of Bay County
- 86 Growing Minds Center Inc.
- 02 Gulf Coast Children's Advocacy Center
- 28 Gulf County ARC & Public Transportation
- 82 Habilitative Services of North Florida, Inc.
- 72 Habitat for Humanity of Bay County, Florida Inc.
- 74 Healthy Start of Bay, Franklin and Gulf Counties, Inc.
- 41 Independence for the Blind of West Florida
- 31 Life Management Center of Northwest Florida, Inc.
- 12 Mental Health America of Bay County, Inc.
- 29 North Florida Child Development, Inc.
- 22 North Florida Office of Public Guardian, Inc.
- 99 Ronald McDonald House Charities of Northwest Florida, Inc.
- 38 Second Chance of Northwest Florida, Inc.
- 66 St. Andrew Bay Center, Inc. (The Arc of the Bay)
- 39 St. Andrew Community Medical Center
- 67 The Salvation Army
- 97 The Science & Discovery Center of Northwest Florida, Inc.
- 14 Tyndall Air Force Base Youth Programs
- 19 Washington County Council On Aging, Inc.



For a more detailed description of services offered by our partner agencies, please visit our website:

EMPLOYEE CAMPAIGN CHECKLIST

PRE-CAMPAIGN

- *Attend Employee Campaign Coordinator training.
- *Check out the Campaign Central tab on www.unitedwaynwfl.org/campaign-central.
- *Meet with your Loaned Executive to review your employee campaign strategy.
- *Establish an employee campaign goal.
- *Recruit key helpers, if necessary.
- *Establish an employee campaign time table.
- *Publicize your employee campaign time table.
- *Ask for employee testimonials.
- *Publicize your employee campaign to employees.
- *Attend the Campaign Kickoff Breakfast.
- *Set up partner agency speakers and/or tours with assistance from Sarina Di Calogero, sdicalogero@unitedwaynwfl.org.

CAMPAIGN

- *Kick off your campaign with an employee campaign rally.
- *Follow up with employees.
- *Regularly check in with your Loaned Executive.
- *Send employee campaign photographs and videos to Sarina Di Calogero at sdicalogero@unitedwaynwfl.org.

POST-CAMPAIGN

- *Tabulate results and submit your Campaign Report Envelope.
- *Send copies of your Pledge Forms to your payroll department.
- *Thank your donors.
- *Evaluate the strengths and weaknesses of your campaign in preparation for next year.

EMPLOYEE CAMPAIGN TIPS, STRATEGIES, AND INCENTIVES

EMPLOYEE CAMPAIGN TIPS

***Set goals:** Setting both monetary and participation goals is a critical step in setting expectations throughout the organization and creates a common cause. United Way of Northwest Florida will help you calculate goals that are reasonable for your workforce.

***Set a Schedule:** Publicize it, and stick to it. Let everyone know ahead of time what events and meetings are planned, when Pledge Forms are due, and when totals will be announced. Coworkers are more likely to turn in their Pledge Forms on time when they have a deadline.

***Work with a Committee:** Assembling a committee to organize the United Way of Northwest Florida workplace campaign is one of the most important ways to guarantee a more successful fundraising effort. It spreads the labor, contributes to building a team atmosphere, and produces more creativity.

***Have a Visible Role for Executives and Management:** Make sure all employees know that the United Way of Northwest Florida campaign is supported by management. Arrange for the CEO to speak at a staff meeting. Have the CEO and management sign emails and letters that go out to all employees expressing support for the campaign.

***Emphasize Giving Through Payroll Deductions:** Giving through payroll deductions is the easiest way for most employees to make the biggest impact they can.

***Let United Way of Northwest Florida Help You:** We are ready to help you conduct your employee campaign in a number of ways. We can:

*Give you an employee campaign video.

*Speak to your employees.

*Arrange for partner agency representatives to speak to your employees.

*Arrange for tours of our partner agencies.

***Motivate Employees:** Whether or not we admit it, we all respond to incentives. Knowing that you are “doing good” is nice. Knowing that you are doing good and have a chance to win an extra vacation day is even nicer. Here are some ways to motivate your employees:

*Casual Dress Days

*Business Merchandise

*Gift Cards

*Grand Prize Drawings

*Paid Day Off

*Track your Goals: One great way to motivate employees is to publicly track your goal. One way to do so is by placing United Way of Northwest Florida goal thermometers around your workplace.

*Encourage Leadership Giving: Couples and individuals who give \$1,000 or more become Leadership Givers.

*Thank Everybody and Celebrate Your Success: Thank everyone, even if they chose not to give this year.

EMPLOYEE CAMPAIGN STRATEGIES

INCREASING EMPLOYEE PARTICIPATION

- *Schedule an Employee Campaign Rally to educate employees about needs in the community and United Way of Northwest Florida's role in helping to address them.
- *Ask your CEO to get involved with the campaign.
- *Take campaign volunteers and employees on partner agency tours.
- *Conduct prize drawings for employees who return their Pledge Forms by a certain date.
- *Ask employees in groups or in one-on-one meetings to consider giving.
- *Recruit employees who have been helped by a United Way of Northwest Florida partner agency to share their story with others.
- *Develop campaign goals with increased participation in mind.

INCREASING THE AVERAGE EMPLOYEE GIFT

- *Encourage a separate Leadership Giving campaign as the easiest way to increase campaign dollars.
- *Promote Leadership Giving opportunities among all employees.
- *Offer incentives for specific levels of giving.
- *Promote company-matched employee campaign contributions to United Way of Northwest Florida, if applicable.
- *Promote payroll deduction giving.
- *Set and publicize your goals to employees.

EMPLOYEE CAMPAIGN RALLY AGENDA **(15 MINUTES)**

*Send an invitation from the CEO to all employees stating the purpose of the Employee Campaign Rally a week before the event.

DISTRIBUTE CAMPAIGN BROCHURES AND PLEDGE FORMS (1 MINUTE)

OPENING REMARKS BY THE EMPLOYEE CAMPAIGN COORDINATOR
(2 MINUTES)

REMARKS BY A UNITED WAY OF NORTHWEST FLORIDA REPRESENTATIVE
(2 MINUTES)

REMARKS BY A UNITED WAY OF NORTHWEST FLORIDA PARTNER AGENCY SPEAKER
(5 MINUTES)

ANSWER QUESTIONS
(3 MINUTES)

COLLECT PLEDGE FORMS
(1 MINUTE)

SAY THANK YOU
(1 MINUTE)

*Timeline suggested above may need to be modified for time constraints.

FUNDRAISER IDEAS

While a fundraiser should never take the place of payroll deductions, they can provide a good team-building experience, and are a great complement to your overall campaign.

*Auction

*Baby Picture Match Game

*Bake Sale

*Bar-B-Q

*Casual Day

*Cook Off

*Dunking Booth

*Game Day

*Guess How Many in the Jar

*Jean Days

*Partner Agency Luncheon

*Raffle

*Social

*Talent Contest

*Trivia Contest

PARTNER AGENCY SPEAKERS

Speakers include United Way of Northwest Florida board members, staff, or volunteers and partner agency clients or staff. Speakers are a key component of an effective employee campaign rally or Leadership Giving meeting. They remind employees of the difference their donations make within Bay, Calhoun, Gulf, Holmes, Jackson, and Washington counties.

BENEFITS OF A PARTNER AGENCY SPEAKER

United Way of Northwest Florida speakers discuss the direct effects of a particular program on their own or another's life, the work done at their agency, and/or the value of the agency's partnership with United Way of Northwest Florida. Presentations can be tailored to the interests of your employees.

SCHEDULING A PARTNER AGENCY SPEAKER

See the list of partner agencies in this guide for reference. Contact Sarina Di Calogero at sdicalogero@unitedwaynwfl.org about scheduling speakers.

PARTNER AGENCY TOURS

BENEFITS OF A PARTNER AGENCY TOUR

United Way of Northwest Florida partner agency tours expose employees to the many needs of our community and let them see how their donations make a difference. Also, tours encourage employees to get involved with a community organization in a fun and educational way. Host your campaign committee or Leadership Giving meeting at a partner agency. Send a representative from each department or area of your company to tour a partner agency and communicate their experience to their fellow employees.

SCHEDULING A PARTNER AGENCY TOUR

See the list of partner agencies in this guide for reference. Contact Sarina Di Calogero at sdicalogero@unitedwaynwfl.org about scheduling tours.

COMMUNITY CAMPAIGN REPORT ENVELOPE

INSTRUCTIONS

- *Complete your employee campaign by December 1st.
- *Make sure all Pledge Forms are signed.
- *For Leadership Givers (\$1,000 or more), please complete the Red Feather box on the Pledge Form.
- *Make sure a Total Gift amount is listed on each Pledge Form.
- *Include your Corporate Donation Form, if applicable.
- *Please complete the entire front side of the Community Campaign Report Envelope.
- *If the financial section of the Community Campaign Report Envelope is not complete, a Release Form must be signed for auditing purposes.
- *Do not staple cash or checks to Pledge Forms.
- *If you hold a special event that involves coins, please convert the coins to either a check or currency.
- *Use the Giving Summary Sheet to tally the pledge types and amounts. Visit www.united-waynwfl.org. Hover over the Campaign Central tab, click on 2017 Brochure, Pledge Form, E-Workbooks, etc., and then click on the 2017 E-Workbook.
- *Transfer the totals from the Giving Summary Sheet to the front of the Community Campaign Report Envelope. If using the E-Workbook, this will automatically be done.
- *The top (white) copy of each Pledge Form is for United Way of Northwest Florida, the middle (yellow) copy is for your employer, and the bottom (pink) copy is for the donor.
- *Make sure the United Way of Northwest Florida copies of the Pledge Forms are included inside the Community Campaign Report Envelope.
- *Turn in the employer copy of the Pledge Forms to your appropriate payroll department for payroll deductions.
- *The Community Campaign Report Envelope, enclosed monies, Pledge Forms, and Giving Summary Sheet should balance.
- *Sign and seal the Community Campaign Report Envelope.
- *Turn in your Community Campaign Report Envelope to your Loaned Executive or to United Way of Northwest Florida within 5 days of closing your campaign.

KEY DATES

MY CAMPAIGN

Distribution of Employee Campaign Materials _____

Employee Campaign Meeting(s) _____

Employee Campaign Rally _____

Partner Agency Tour(s) _____

Pledge Forms Due _____

Employee Campaign Results Due to United Way of Northwest Florida _____

Community Campaign Report Envelope Due to United Way of Northwest Florida _____

Awards/Recognition _____

UNITED WAY OF NORTHWEST FLORIDA EVENTS

Employee Campaign Coordinator Training _____

Campaign Kickoff Breakfast _____

Overall Campaign Results Due _____

Annual Report Breakfast _____

UNITED WAY OF NORTHWEST FLORIDA
STAFF CONTACT INFORMATION

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Mailing Address: PO Box 586, Panama City, Florida 32402

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Robyn Heath

Communications Specialist

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(850) 785-7521

Loaned Executive _____

Email Address _____

Phone Number: _____

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United Way of Northwest Florida

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