Contact Us

P. O. Box 586
Panama City, FL 32402
Main Phone Line: (850) 785-7521
Web: www.unitedwaynwfl.org

Bryan Taylor, President and Chief Executive Officer
btaylor@UnitedWayNWFL.org
(850) 215-6748

Hollee Hansen, Finance Director
hhansen@UnitedWayNWFL.org
850.215.6753

Angela Klopf, Resource Development Director
development@UnitedWayNWFL.org
607.481.5362

Christy Rogers, Campaign Director
crogers@UnitedWayNWFL.org
850.380.4155

Ken McVay, Communications Director
kmcvay@UnitedWayNWFL.org
850.527.5192

Tami Valdez, Community Outreach Director
tvaldez@UnitedWayNWFL.org
850.625.8882
Table of Contents

Introduction to United Way of Northwest Florida........................................4
  Our Vision and Mission
  What is a Campaign Coordinator?
  Campaign Checklist
  Frequently Asked Questions

Steps to a Successful Campaign.................................................................12
  Step One: Meet and Engage with your CEO
  Step Two: Recruit/Plan Your Campaign
  Step Three: Review and Evaluate Past Performance
  Step Four: Set Employee Goals
  Step Five: Publicize Your Campaign
  Step Six: Conduct Educational Campaign
  Step Seven: Promote Leadership Giving
  Step Eight: Ask Everyone to Give
  Step Nine: Report Results and Say Thank You
  Step Ten: Have fun!

The Employee Workplace Campaign .........................................................27
  Employee Campaign Rally Agenda
  Employee Campaign Rally Sample Scripts
  Critical Talking Points

Employee Campaign................................................................................30
  Tips, Strategies and Incentives
  Fundraiser Ideas
  Campaign Envelope Instructions
Who is United Way?

*United Way Vision*
A community in which there is significant lasting change whereby all individuals and families achieve their full potential.

*United Way Mission*
Enrich and empower lives by fostering and uniting resources with those in need.

*United Way Guiding Principals*
Respect the dignity of all peoples; understand and represent the best interests of all community members’ promote family preservation’ enable people to be more healthy, self-reliant, productive, and involved; and maintain the highest integrity in all we do.

- Assess community needs on a continuing basis and identify critical health and human services issues; and focus community resources on programs that help create safe, supportive, and prosperous communities where everyone contributes to community building.

- Be proactive in generating and coordinating the public, nonprofit, and private resources necessary to meet targeted needs; conduct cost-effective fund raising; be accountable to donors for every dollar raised; and promote and support volunteerism as a vital community resource.

- Develop and maintain community support through concentrated strategic marketing communication activities, reaching the above goals.
A Campaign Coordinator is...

... a person who helps their organization/business work with United Way of Northwest Florida and leads the organization/business’ annual United Way Workplace Campaign efforts and to encourage participation. You will not be working alone! Our staff and your campaign team will help you accomplish all that needs to get done. Below is a checklist that will help you prepare for your company’s campaign.

Your Campaign Checklist:

Prior to the Campaign *(3-5 weeks before the campaign kickoff)*

- Attend United Way Campaign Coordinator Workshop
- Check out the campaign toolkit at www.unitedwaynwfl.org
- Meet with your United Way Contact to review strategy
- Set a campaign goal
- Recruit key helpers at your organization
- Establish campaign timetable
- Publicize campaign to your employees
- Ask for employee testimonials
- Attend Campaign Kickoff Breakfast
- Set up agency speakers to attend your rally via your United Way contact

During the Campaign *(1-2 weeks in duration)*

- Kick off your campaign with a rally
- Follow up with employees
- Check in regularly with your United Way contact
- Send photos to United Way for Facebook/Twitter

After the Campaign *(within 2 weeks after your campaign ends)*

- Tabulate results and submit Campaign Envelope
- Send copies of pledge forms to your payroll department
- Evaluate strengths/weaknesses and plan for next year
- Thank your donors
- Pat yourself on the back for a job well done!
**Frequently Asked Questions (FAQs):**

*What does United Way of Northwest Florida (NWFL) do?*

Established in 1932, United Way of NWFL is a nonprofit, 501(c)(3) agency that partners with nonprofits, businesses, governments & social service agencies to address the community’s most pressing needs. Its primary function is to fundraise 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.

*Does United Way of NWFL 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 NWFL 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.
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.

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:

- **#UnitedWeWin:** 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.

- **#LivingUnitedInNorthwestFlorida:** 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).
• #UnitedWeGrow: 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:

<table>
<thead>
<tr>
<th>Council on Aging: Meals on Wheels Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 in United Way donations</td>
</tr>
<tr>
<td>$9 in matched funds</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Life Management Center: Adoption/Foster Care Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 in United Way donations</td>
</tr>
<tr>
<td>$25 in matched funds</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Early Learning Coalition: School Readiness Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 in United Way donations</td>
</tr>
<tr>
<td>$17 in matched funds</td>
</tr>
</tbody>
</table>

• #United4Income: 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 doesn’t have to 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).

<table>
<thead>
<tr>
<th>Weekly Donation</th>
<th>Annual Donation</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 a week</td>
<td>$52 a year</td>
</tr>
<tr>
<td>$5 a week</td>
<td>$260 a year</td>
</tr>
<tr>
<td>$10 a week</td>
<td>$520 a year</td>
</tr>
<tr>
<td>$20 a week</td>
<td>$1,040 a year</td>
</tr>
</tbody>
</table>
**Is United Way of Northwest Florida part of United Way Worldwide?**

Yes. 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.

**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.

**Is United Way of Northwest Florida a political organization?**

No, 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.
(FAQs continued):

*Is my donation tax deductible?*

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

*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 non-profit 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.
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 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.
10 Steps to a Successful Campaign

1. MEET AND ENGAGE WITH YOUR CEO
   - Send out a personal letter of endorsement from your President or CEO
   - Have your CEO be a part of your kick-off (i.e. speech or participation in first pledge turn-in)
   - Discuss corporate gift
   - Discuss and/or develop your campaign budget

2. RECRUIT A COMMITTEE AND PLAN YOUR CAMPAIGN
   - Set your campaign timeline
   - Discuss your campaign budget
   - Ask for help. Keep in mind people who volunteer are involved because they want to be, and will lend energy to your campaign
   - Decide what your campaign activities will look like (presentations, activities, food and prizes) Please ask your United Way contact to coordinate presentation speakers

3. REVIEW AND EVALUATE PAST PERFORMANCE AND CALCULATE GOAL
   - Work with United Way staff and find out about your company’s giving history
   - Review last year’s campaign and any feedback you received as to what worked and what didn’t work.
   - Incorporate new ideas for this year’s campaign (see campaign toolkit and be creative)
4. **SET EMPLOYEE GOALS**
   - Create a dollar goal and/or percent participation
   - Have a volunteer project available for employees (Please work with United Way contact to setup)

5. **PUBLICIZE YOUR CAMPAIGN**
   - Share how to pledge, when to pledge and what your pledges support
   - Use provided United Way materials (i.e. posters, videos, brochures, etc.)
   - Send email communications to raise awareness about campaign activities and events
   - Create a section on your company’s intranet to share information about United Way and your company’s campaign linking it to United Way’s website (www.UnitedWayNWFL.org)
   - Use incentives to encourage giving
   - Order United Way T-Shirts

6. **CONDUCT AN EDUCATIONAL CAMPAIGN**
   - Invite UW staff to present at a large group meeting
   - Use a guest speaker (UW can guide according to your organization’s interest)
   - Conduct group presentations for all departments if large meetings are not an option (Remember UW staff is excited and available to attend all of your presentations)
   - Ensure every employee received UW materials
   - Follow up with employees to ensure every employee has been given the opportunity to contribute
10 Steps to a Successful Campaign (continued)

7 PROMOTE LEADERSHIP GIVING

- Discuss with your CEO Leadership Giving matching opportunities
- Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO)

8 ASK EVERYONE TO GIVE

- Ensure you ask every person to give by asking your committee and any other advocates to reach out to their coworkers (people say the number one reason they didn’t give is because they weren’t asked)
- Include everyone both active employees and retirees
- Ask your new hires as part of the HR package

9 REPORT RESULTS AND SAY THANK YOU

- Recognize individuals, groups and departments that went “above and beyond” during the campaign
- Announce your final results to all employees through a communication from your CEO and/or conduct a finale activity
- Thank everyone at the time of giving (consider offering a thank you card or small gift from the company for their participation
• Make a “Thank You” display (hang posters, campaign activity photos and mementos of the campaign)
• Give special thanks to your committee (hold a special coffee break which everyone receives recognition from you and the CEO and/or a special gift)
• Collect all pledge cards, place them in your provided report envelope, complete the envelope and schedule a pick-up with your United Way contact

HAVE FUN!

• Engage your employees with creative activities that also educate about United Way
• Provide special pledge incentives, such as prizes for certain people such as first time donors, increased giving and/or other levels you feel appropriate to award
• Volunteer together (www.UnitedWayNWFL.org)

Thank you for serving as your company’s Campaign Coordinator!

Not only are you providing a tremendous service to your company, but your efforts will also make a difference—improving lives and building a stronger community. United Way staff are ready to assist however possible. Please visit our website at www.UnitedWayNWFL.org or simply call us at 850-785-7521. We look forward to working together
Employee Workplace Campaign

**Tips**

- *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.

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

- *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

**Incentives**

- *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 or 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.
Strategies

- There are two Campaign Strategies to grow your Workplace Campaign: Increase Employee Participation and Increase the Average Employee Gift.

- **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.
  - Personalize Pledge Forms with employee names and departments prior to distribution.
  - Take campaign volunteers and employees on partner agency tours.
  - Conduct prize drawings for employees who return their pledge cards by a certain date.
  - Recruit employees who have been helped by a United Way of Northwest Florida partner agency to share their story with others.

- **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 Kickoff**

**Sample Agenda Structure**

*Opening Remarks by the Campaign Coordinator – 3 minutes*

- Share your personal experience with United Way of Northwest Florida or invite the CEO or department head to share the company's history with United Way of Northwest Florida.
- Have campaign brochures and pledge forms distributed and Leadership Giving information available for individuals to take.

*Remarks by a United Way of NWFL Staff Person – 3 to 5 minutes*

- Explain investments United Way of Northwest Florida makes in Bay County with support from companies such as theirs.

*Remarks by a United Way of NWFL Partner Agency – 5 minutes*

- A speaker from one of United Way of NWFL’s partner agencies can offer a vivid illustration of the donors' dollars at work.

*Question & Answer – 3 to 5 minutes*

- The United Way Staff person is there to help answer questions.

*Collect Pledge Forms – 3 minutes*

- “The ask” is most effective coming from the team leader, a fellow employee, or a trained campaign volunteer who has a history of giving.
- Remind or explain that United Way of Northwest Florida recognizes leadership giving for combined household gifts.

*Say Thank You – 1 minute*

- Remind employees of campaign time frame and locations for returning pledges.

*Timeline suggested above may need to be modified for time constraints*
Critical Talking Points

Stays in your community

• The money raised here, stays here in the counties served by United Way of Northwest Florida.

• Over 95% of the United Way campaign dollars are used locally.

Helps those most vulnerable

• United Way partner agencies help thousands of the most at-risk community members every day.

• An individual or family may become vulnerable due to acute emotional, physical, or financial events that leave them less able to help themselves.

If you can’t decide where to designate your funds

• Give your money directly to United Way and it will go into the United Way Community Impact Fund.

• This fund is used to grant money to our partner agencies via a volunteer-led application process.

Volunteers decide

• Volunteers decide who will be funded via the Community Impact Fund and at what levels.

• They examine all agencies who seek funding for effectiveness and for financial accountability.

• So, United Way guarantees that your donation is well spent.

Payroll deduction makes giving to United Way of Northwest Florida convenient and affordable

• Payroll deduction offers the satisfaction of helping your community year round, while lessening the impact a one-time gift of the same amount would have on your finances.

Make “the Ask”

• Please join me in making one gift that gets the best results.

• Give to United Way of Northwest Florida to help the most vulnerable people.
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 compliment to your overall campaign. Here are some tried and true suggestions.

Auction—silent or at an employee luncheon
Agency Lunch
Bake Sale
BBQ
Baby Picture Match Game
Casual Day
Craft Sale
Chili Cook Off
Dance Off
Donut Day
Dunking Booth
Employee Raffle
Executive Auction
Flower Sales
50/50 Raffle
Football Pool
Game Day
Garage Sale
Guess How Many in the Jar
Haunted House
Hoagie Sale
Hole-in-One Putt Putt

Parking Space Auction
Paper Airplane Contest
Penny Wars
Quiz Show
Race for United Way
Raffle Prize Drawing
Shave Your Head
Soup Sales
Scavenger Hunt
Talent Contest
Tug of War
Take This! (Pie in Face)

Ugly Tie, Hat or Sweater Contest
Vacation Day Drawing
Wrap Presents
Water Balloon Volleyball
White Elephant Sale
Xylophone Concert
Yard Sales
Zucchini Races

How to create BUZZ about your United Way Workplace Campaign

- Wear your LIVE UNITED shirt and ask other leaders to wear theirs too
- Put together a window display of LIVE UNITED signs/posters
- Use chalk to write “LIVE UNITED” in the parking lot, in front of the office, or on another paved surface
- Conduct a contest to encourage a little friendly competition
- Design a Wall of Frame recognizing employees for continued giving
- Make a short video about why you choose to LIVE UNITED
Campaign Envelope Instructions

- The Campaign Coordinator or Payroll Specialist should be the person to prepare the Campaign Envelope once you have all pledge forms returned by the employees.

- The pink copy of the pledge form is kept by the Donor, the yellow copy of the pledge form is kept by the Employer, and the white copy of the pledge form should be returned to United Way in the Campaign Envelope.

- The Giving Summary Sheet should be completed with the totals from that sheet matching the totals on the front of the envelope. Both of these forms are available in electronic form on our website www.unitedwaynwfl.org

- The Current Campaign Year is 2020 and can be completed at the top of the envelope.

- If your business or organization has offices in more than one county, please complete a separate envelope for each county.

- Please complete all sections of the business information to ensure the information we have is updated each year.

- The middle portion should be completed fully with zeros entered for portions that had zero donors or amounts.

- The person preparing the forms needs to print and sign their name at the bottom of the envelope and seal it with all campaign paperwork enclosed (pledge forms and giving summary sheet)

- You can drop of completed campaign envelopes at 842 Harrison Avenue, Panama City, FL 32401 or Call United Way’s Campaign Director, Christy Rogers (Bay County) at (850) 380-4155 OR Development Director, Angela Klopf (Neighboring Counties) at (607) 481-5362 if your campaign envelope needs to be picked up.