



2016 - 2017

EMPLOYEE CAMPAIGN COORDINATOR HANDBOOK

LIVEUNITEDANC.ORG

Working together. Inspiring hope. Improving lives.



#LIVEUNITEDANC



United Way of Anchorage



Dear Friends,

Thank you so much for serving as the Employee Campaign Coordinator for your company this year. We at the United Way of Anchorage are truly grateful for your efforts. Your role as Campaign Coordinator is critical. Because of your work on the fundraising campaign, United Way is making an impact in our community. We are “connecting the dots” and creating systems in our community that get the right supports at the right time to those most at risk.

By working together, we *INSPIRE HOPE*...

- In 2005, 4 in 10 of our youth were **not** graduating
- Together, we have worked to raise the graduation rate to almost 80%, and now more of our kids have a brighter future
- The goal is 90% high school graduation by 2020!

By working together, we *IMPROVE LIVES*...

- 10 years ago, if the shelters were full in the winter, children were sleeping in cars or tents with their parents.
- Together, we found a solution and for the past 5 winters, NO families with children have needed to sleep outside in the cold.
- The goal now is to end homelessness.

United Way of Anchorage staff are available to help and support you during every step of your campaign. I hope you will refer to this Employee Campaign Coordinator Handbook often. It contains helpful best practices, new strategies, sample tools and much more. Also be sure to visit liveunitedanc.org for additional information.

Every effort you make this year is combined with the efforts of hundreds of others who are working on their campaigns. We know that great things happen when we work together, when we LIVE UNITED! Thank you for all you do to create a successful campaign for the United Way of Anchorage.



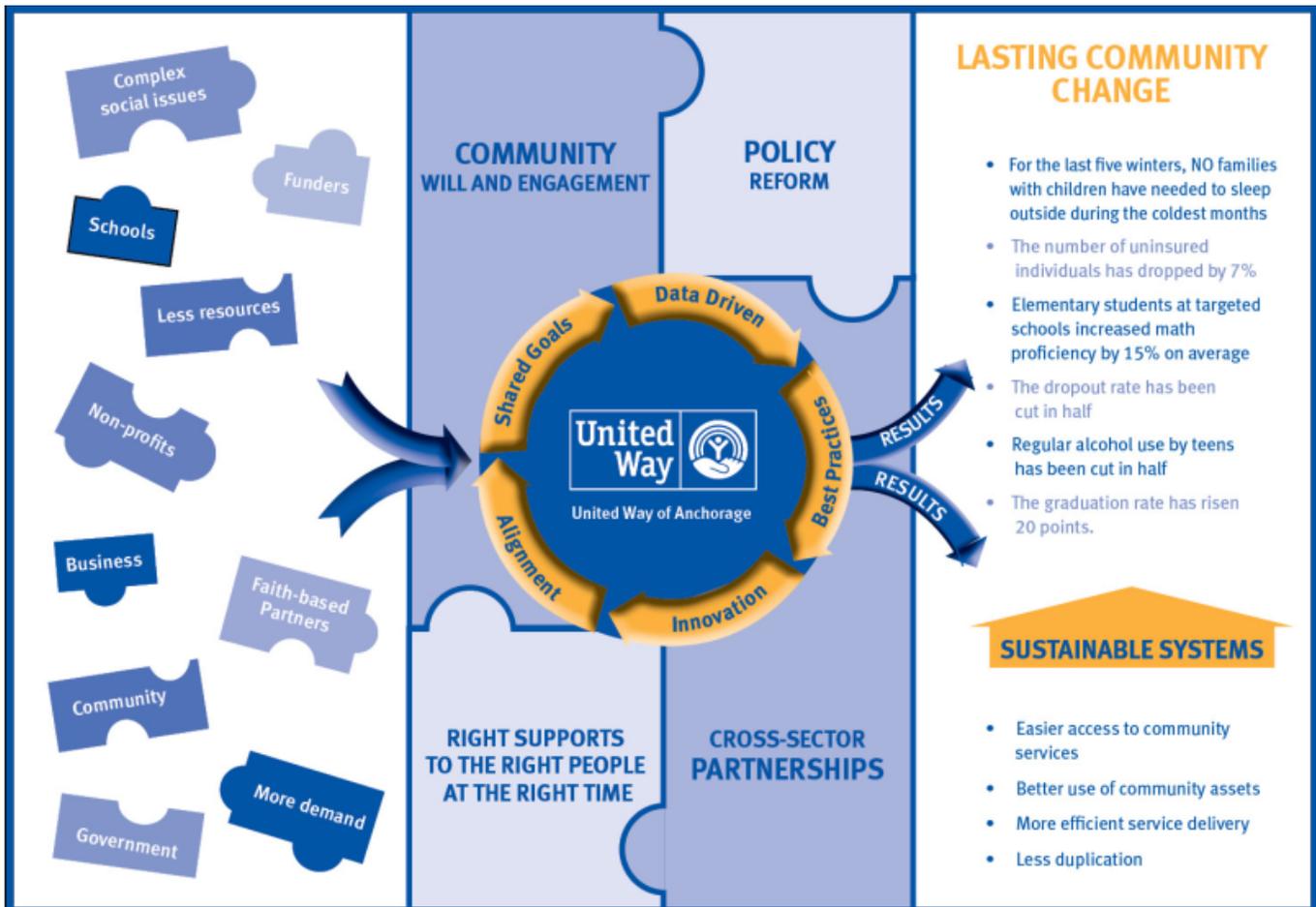
Michele Brown
President
United Way of Anchorage

What We Do

At the United Way of Anchorage, we bring people together – businesses, government, faith community, non-profits - to effectively solve complex community issues by maximizing resources to create a thriving community for everyone. Our focus is on:

- Successful Prepared Kids
- Strong, Financially Stable Families
- Healthy Kids and Adults
- Warm Housed and Fed Families

We've been making great strides in Anchorage for 60 years... but there's more to do. The goals are ninety percent graduation by 2020, and to get families out of shelters and into permanent homes.

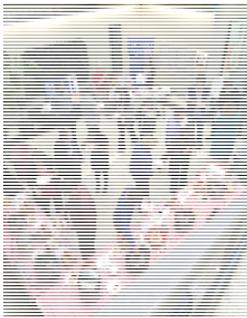




How to Run a Great Campaign

This handbook includes information that will help you run a great campaign and give you ideas from fellow Campaign Coordinators and best practices from staff on the United Way team. During your campaign:

- 1. You'll enjoy your role as Campaign Coordinator.**
Not only will you successfully raise money to ensure that youth are graduating and that families will have stable housing, but you'll have fun doing it.
- 2. Your employees will understand how they can make a difference by participating.**
People like to get involved in helping the community. With your Workplace Campaign, they can have fun at the same time.
- 3. Your company will get the most out of its partnership with United Way.**
Whether you have an official corporate social responsibility policy or not, giving back to the community will help your company stand out from the crowd.



And remember...United Way staff is here to help you! Reach out to your Relationship Manager:

Vice President of Resource Development- Elizabeth Miller: emiller@ak.org or 263-3842

Campaign Director- Joy Star Lovitt: jlovitt@ak.org or 263-3818

Relationship Manager- Craig Miller: cmiller@ak.org or 263-3814

Relationship Manager- Amber Howard: ahoward@ak.org or 263-3819

Individual Giving Director- Lilah Walker: lwalker@ak.org or 263-3855



Campaign Coordinator Check-List

PLAN

- Meet with your United Way Relationship Manager and begin planning your campaign
- Secure CEO and senior management support
- Establish campaign goals like fundraising dollar amount and participation percentage
- Order campaign supplies and prepare any custom materials your company wants

GEAR UP

- Recruit and train your campaign team
- Establish a timeline for campaign events
- Begin campaign promotion with a recap from the previous year (sample available)
- Send a letter from management to all employees (sample available)
- If applicable, update your online pledge site or intranet

RUN

- Conduct a pacesetter campaign for current or potential leadership donors
- Host a campaign kick-off event with United Way speakers
- Host an off-site volunteer event to engage employees and teams
- Make sure every employee gets a pledge form or the link to your online giving site
- Hold meetings and fundraising events with all departments

CLOSE

- Send reminder email that pledge forms need to be returned by campaign close
- Collect pledge forms and submit campaign totals to United Way of Anchorage
- Submit pledge forms and final reports to your payroll department
- Announce campaign results to all employees
- Thank employees and campaign committee with a celebration, letter, email, etc.
- Gather feedback and notes for next year and debrief with United Way staff
- Discuss year-round engagement opportunities with United Way staff



Pick What Works For Your Company

No two companies are the same, so no two campaigns will be the same either. Just remember to do what works for your company culture and environment and to have fun in the process. Below are some ideas to choose from to customize your campaign. Just let your Relationship Manager know what will work for your company and they will help give you the tools to make it a success!

Campaign Events

- Kick-off Event
- Fundraising Events
- United Way Game Show
- Team Building Events
- Thank You Event

Employee Education and Communications

- Lunch and Learns
- Agency Tour
- United Way/Agency speaker
- Leadership Communications
- Inspirational Presentation
- All-Employee Communications

Volunteerism

- Day of Caring
- Food or supply drives
- [-bethechange907.org](http://bethechange907.org)
- Recurring or one-time opportunities

Targeted Audience Engagement

- Retirees
- New Employees
- Emerging Leaders/Millennials
- Top-Level Executives



Ten Great Ideas To Get And Keep People Involved

- 1 Create office teams to encourage friendly competition and boost morale.
- 2 Encourage your in-house clubs or employee resource groups to help spread the campaign message and incorporate the campaign into their existing activities.
- 3 Host a group volunteer activity for employees to see their dollars at work.
- 4 Host food-themed events and contests like chili cook-offs or ice cream socials.
- 5 Mission. Mission. Mission. The more you can incorporate the reasons WHY your company is participating in the campaign, the better!
- 6 Host one of United Way's inspirational presentations for your company and invite other companies to come join in.
- 7 Invite a senior executive to host a recognition event for Leadership and Tocqueville donors.
- 8 Use the "Walk in My Shoes" link/site or display to reveal the difficult decisions some people in our community have to make every day.
- 9 Put a "Pay Day" candy bar with every employee's paystub with a note asking them to share their pay day with United Way through payroll deduction.
- 10 Offer small rewards for reaching goals or offer a chance to win a prize that all donors are eligible for.



Campaign Events

Kick-Off Event

Hosting a campaign kick-off event can be an exciting and simple way to launch your campaign. Below are some tips for a successful campaign kick-off.

1. **Repurpose an existing meeting** that people are required to attend rather than adding an additional meeting to people's calendars.
2. **Make sure your top level executives are able to attend** and show their support.
3. **Make it Fun!** Create a theme, provide food or light snacks, consider doing a prize drawing, anything that will get your employees excited and energized.
4. If you do not have one all-staff meeting, **consider hosting multiple kick-off events.** These can be hosted at separate locations, within smaller teams, on different floors of a building. United Way is here to help and happy to attend multiple kick-off events.
5. Most importantly, **include your United Way Relationship Manager**, who can offer additional ideas for how to customize your kick-off. Allowing them to speak about the impact your employee giving makes on the community is critical.

See the “**Campaign Ideas**” handout for a list of great campaign themes and events that you can use at your workplace.



Volunteer Ops

Volunteer Opportunities and other ways to support United Way

This list of volunteer opportunities is a great way for your employees to engage with United Way through community service. Contact your United Way Relationship Manager for more information on these opportunities. If you are unsure who your RM is, please call Joy Bigelow at 263-3815 or email jbigelow@ak.org. Many of these opportunities are also online at bethechange907.org.

Directly support the community

One-time volunteer opportunities:

Day of Caring (September) - This is a great opportunity to give back during a community wide day of service. Many nonprofits rely on this event to complete large projects with the help of a volunteer team from a local business.

Walk/Run for Warmth (February) - Register to run a 5k or walk with a group of friends or your coworkers. Sign up a team and fundraise to keep Anchorage families warm, housed, and fed.

Food or Basic Needs Supply drive - Organize a drive for food or basic needs supplies (diapers, socks, toiletries, etc...) to help fill basic needs in our community.

Financial Fitness Fairs / Super Saturdays - These events help improve the financial stability of families and individuals. Volunteer to help set-up, greet attendees, and more.

Graduation Stations - Help man our booth during fairs and festivals around Anchorage and encourage kids and families to set the goal of graduating from high school.

Ongoing volunteer opportunities that may require training or an ongoing commitment:

Homework Club - Assist students with homework and teach study skills after school.

Lunchtime Reading Buddies - Read with a student or small group.

After-School Sports - Organize athletic activities for students.

Tutoring - Help students practice and master learning objectives.

Open Library/ Morning Math - Play board games and help with homework.



Tax Prep Volunteer - Help struggling families get a larger refund. This volunteer opportunity requires 40 hours of training, but is extremely rewarding.

Tax Prep Coaches - This volunteer opportunity also helps struggling families get a larger refund, but requires less training (8 hours).

Saving Ambassadors - Help others become more financially stable by encouraging them to take the Alaska Saves pledge and create a savings plan.

Rally around a cause / Help spread the word / Show your support:

Once a year events

#I Use Math (February)

Spread the word about the importance of math by sharing on social media how you use math in your day-to-day life.

Grad Blitz (May)

Help congratulate our local graduates with signs in your business and on social media.

Chalk the Walk (May and August)

Showcase your artistic talent on the sidewalks of local schools and help pump up the youth for the first day of school (August) and graduation (May).

Ongoing Opportunities / Any time of year:

Information tables - Does your business receive a lot of foot traffic? Ask United Way to host an information table on healthcare navigation or our education work.

Social Media Ambassador - Like United Way of Anchorage's Facebook page and like, share, comment on our posts and events to help spread the word.



United Way's e-Pledge Features and Benefits

Features:

- Real time results from pledges made online
- Reduces reliance on paper pledge forms
- Allows CEO/ECC to personalize the “ask” to employees and customize site with company information
- Online reports and online/telephone technical assistance
- Option for real-time updates on departmental and company-wide goals
- Information about the United Way Community Action Fund and Action Areas, outcomes, success stories
- Allows users to create "donor profiles" to stay in touch with United Way and see how their donations go to work
- Highly Secure Environment; quick and simple site navigation

Benefits:

- Research shows employee giving increases
- Campaign data will be reflected immediately and accurately
- All communications and pledging via a secure web site, enabling access from work, home or while traveling
- Validates pledge before submission to payroll
- Payment choice of payroll deduction, credit card, direct bill, stock or check
- Reduces amount of data entry by payroll staff (payroll integration)
- Provides easy communication with all employees regarding company's mission and community involvement
- Continues benefits of a traditional United Way "high-touch" workplace campaign experience
- Reduces administrative time and costs associated with workplace campaign



e-Pledge Frequently Asked Questions

Q: Will there be a minimum bill-me amount?

A: There is a \$50 minimum for donors requesting home billing.

Q: Will a donor have the ability to enter multiple pledges?

A: As long as your campaign is still open each donor will have the opportunity to pledge as many times as desired through e-Pledge. Once the campaign is closed, please contact the United Way office for any additional pledges or changes.

Q: How are paper pledge forms entered and how are paper pledge forms collected and provided to United Way?

A: The system has the ability to allow company coordinators to enter paper pledge forms during the campaign; however, if there is a substantial amount of paper pledge forms we highly recommend you forward those to United Way for input.

Employee Campaign Coordinators should collect the pledge forms and monies from their assigned employees and turn them in to the Workplace Relationship Manager(s) who will make arrangements with the United Way Campaign Director for speedy transfer of materials.

Q: What should we do if donors have trouble accessing the site?

A: In an event of technical difficulties, please contact Jenn Lewis at 263-3856 or jmlewis@ak.org. Support hours are Monday through Friday from 9:00am until 4:00pm. We will work to resolve any issues in a timely manner.

Q: What are the United Way's policies regarding donor information and privacy issues?

A: United Way of Anchorage retains information provided by users in a secure database. We will never sell, trade, or share your information without your prior consent. For online security, we maintain a 128-bit encrypted SSL digital certificate through Security Metrics.

Q: Will donors receive e-Mail communications from the United Way during/following the campaign?

A: The e-mail addresses received by UWA are strictly confidential and used only for the following purposes:

To send automated e-mails directly from e-Pledge including User ID & Password, Password Changed, e-Mail Changed, Confirmation of pledge, and any customized messages that may be needed.

Q: What about employees hired after we send you the data file? Can they use e-pledge?

A: A new employee can be easily set up for e-Pledge at any time. Simply send the name, employee ID, e-Mail address and all other pertinent information to your e-Pledge Manager. The new employee will be set up and the personalized link will be sent.



Pledge Form Processing / Campaign Closeout Checklist

Checking pledge forms for accuracy as they are turned in will help ensure the accounting process runs smoothly.

A. Pledge Forms

- Donor's name and address are clearly legible.
- Payroll deduction donations have the correct number of pay periods for your company.
- Pledge forms have been signed and dated by the donor.
- Blue copy of pledge form is given to the donor.
- Yellow copy of pledge form is forwarded to your payroll office.
- White copy of pledge form is sent to United Way in a white Campaign Envelope.
- Pledge forms are grouped by work location/city and put into separate envelopes.

B. Accounting Spreadsheet

- Create an accounting spreadsheet and include a copy in the white Campaign Envelope. See an example of a Donor Tracking Spreadsheet [here](http://www.liveunitedanc.org/campaign-portal/campaign-toolkit/campaign-documents/): <http://www.liveunitedanc.org/campaign-portal/campaign-toolkit/campaign-documents/>

C. Campaign Envelope – white

- Corporate Gift** - enter amount if applicable
- Special Events** - enter amount of CHECKS ONLY, **NO CASH**
- Employee Gifts** - Pledge forms with checks, direct bill / EFT, credit card, or payroll deduction information. Enter amounts separately for each payment type.
- Completed pledge forms enclosed.

D. Campaign Envelope – green

- CASH ONLY** - cash or coin with an attached, corresponding pledge form
- CASH ONLY** - special event money
Please count and verify cash in the presence of a United Way staff member before sealing the envelope.

E. Campaign Closeout Documents – TO BE RETURNED TO UNITED WAY CONTACT

- Payroll Deduction Disbursement Form – may require assistance from your payroll contact
- Corporate Gift Disbursement Form – may require assistance from company leadership
- Recognition Form
- Recognition Plaque – if applicable
- Extra campaign materials returned



United Way Campaign Raffles, Auctions & Sweepstakes

Raffles, auctions, or sweepstakes can be effective ways to motivate employees to participate in the United Way campaign. There are advantages and disadvantages of running raffles, auctions and sweepstakes that your United Way representative can discuss with you. However, if you choose to hold raffles, auctions or sweepstakes, there are several considerations you must take into account:

- ✓ The IRS Code as it pertains to tax deductions for charitable gifts.
Go to: <http://www.irs.gov/pub/irs-pdf/p526.pdf>
- ✓ The Alaska State Gaming Statutes and the subsequent accounting procedures—this information is available from UW staff person Sue Ross at sross@ak.org.

Determine if you are holding a raffle OR a game of skill or chance or sweepstakes (door prize).

Raffles – UW has a permit and you may use it for raffles.

If your proposed activity includes the following aspects, your RAFFLE is allowed. (Monies paid to purchase raffle tickets ARE NOT TAX DEDUCTIBLE.)

1. Participants paying for a ticket/chance to win specific prize
2. Winning ticket is drawn at random
3. Winner receives prize of substantial value

If you elect to conduct a raffle, you MUST:

- Contact **Sue Ross**, Director of Finance/Accounting, at sross@ak.org or 263-3813 for United Way of Anchorage **raffle permit number and instructions**.
- Track and account for raffle monies separately from employee pledges. **Do not use pledge forms for raffles.**
- Turn in raffle proceeds AND **all ticket stubs and any remaining stubs** directly to Sue Ross.

Auctions (live, silent or via internet or intranet): No permit necessary.

1. Items offered for bidding.
2. Highest bidder “wins” item and pays bid amount for it.



Only amount of bid in excess of fair market value of item is tax deductible. If you elect to conduct an auction, please to the following:

- Track and account for auction monies separately from employee pledges. Do not use pledge forms for auctions. Please convert auction cash to a company check.
- Turn in auction proceeds in the pledge envelope to your UW representative. Reflect amount in “special event” section on envelope.
- Contact your relationship manager to request a template Excel spreadsheet for you to complete and submit to UW if you have donors of items to your auction that wish to receive tax receipt for their donation
- YOU - the company representative - are responsible for informing winning bidder that only amount of bid in excess of fair market value of item is tax deductible. (Easiest to include this statement, amount of winning bid and fair market value of item in a “receipt” for each winner.)

Sweepstakes (Door Prize): No permit necessary.

1. No purchase necessary to win. (You can highlight the option for a chance to win with every gift, but fine print must allow for non-givers to enter the sweepstakes. This can be done by telling non-givers to submit entry in writing by specific date. Those non-givers must be included in final drawing. Because it is a sweepstakes, the full amount of any gift given in relation to the sweepstakes is tax-deductible.)
2. Prize of substantial or non-substantial value awarded at random

If you elect to hold a sweepstakes, please be aware of the following:

- Ensure that those who choose not to give to the United Way have the same chance of winning as the employee who contributes (i.e. everyone has opportunity to receive a ticket for the sweepstakes).
- If value of prize is \$600 or more your company may be responsible for providing the winner a completed IRS form 1099 for the prize.

UNITED WAY STAFF MEMBERS ARE NOT LEGAL OR TAX EXPERTS. WE HAVE PROVIDED THE ABOVE INFORMATION BASED ON THE BEST OF OUR KNOWLEDGE. WE HIGHLY RECOMMEND THAT CONSULT YOUR COMPANY'S TAX ADVISOR OR LEGAL COUNSEL FOR FURTHER INFORMATION AND INSTRUCTION.