





Internal Coordinator Training


July 30, 2020



Purpose of Today:

- Connect you with the mission of United Way and build excitement for our work
- Clarify your role as Internal Coordinator
- Provide updates to Campaigning in a COVID-19 world
- Help you begin your Campaign Plans for 2020 – 2021 using Best Practices


United Way of the Brazos Valley 



Introductions

The Resource Development Team

<p>Alison Prince, President & CEO</p> <p>979-696-4483 x101 979-220-3046 (cell) aprice@uwbv.org</p>	<p>Norma Noonan, Coordinator – Donations Management</p> <p>979-696-4483 x118 nnoonan@uwbv.org</p>
<p>Maggie Gray, Coordinator – Donor Relations</p> <p>979-696-4483 x118 mgray@uwbv.org</p>	

United Way of the Brazos Valley 

UNITED WE FIGHT.
UNITED WE WIN.
LIVE UNITED

United Way of the Brazos Valley fights for the health, education, and financial stability of every person in the Brazos Valley.



UNITED WE FIGHT.
UNITED WE WIN.
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Campaign Video





United Way provides \$325,000 to 22 Nonprofit Organizations for 2020-2021





United Way's Impact in the Brazos Valley

Program	*Amount Invested	**Individuals Impacted
Community Impact Grants	\$325,000	13,356
2-1-1 Texas	\$334,000	41,951
Early Literacy Program (Baby Bundles and Book Bash events)	\$20,000	6,120
Youth Leadership Cabinet – Community Builders Grant	\$11,000	
COVID-19 Community Relief Fund Mask Distributions	\$1,200,000	36,000+ 3,000+
TOTAL:	\$1,890,000	100,427+

* Investment amounts include funds from Campaign donations and outside funding sources
** Includes data from past fiscal year or last complete reporting period.



Supporting United Way...

- Allows any person to be philanthropic and shows the power of COLLECTIVE GIVING!
 - \$1 to United Way compounds into millions
- Gives donor the opportunity to maximize their giving through 1 gift.
- Supports community and social services that are MORE CRITICAL THAN EVER due to impacts of COVID-19.



Partner Agency Video Tours

- [NAMI Brazos Valley](#)
- [Aggieland Pregnancy Outreach](#)
- All Partner Agency Video Tours can be found on [United Way's YouTube channel](#)





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Role of the Internal Coordinator

1. Serves as the liaison between your company's employees and United Way – EVEN MORE CRITICAL TODAY
 - Connect co-workers to United Way's mission and work
2. Coordinate Campaign Efforts, communicates adaptations
 - Be the point person to get materials where they need to go!
 - Distribute to employees → Collect from employees → Get to HR for processing → Send results to United Way
 - Provide engagement activities throughout the year
 - Keep the United Way Campaign FUN and IMPACTFUL!

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United Way

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Video from LE/IC

- Steve Fullhart Video

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United Way



2020-2021 Community Campaign

- General Timeline:
 - Fall: Campaigns (Sign up/Pledge Period)
 - Spring (April): United Way finalizes reports and campaign numbers
 - Jan – Dec: Collection of Pledges
- Work with ~120 companies to run Employee Workplace Campaigns
 - Employee invests a portion of every paycheck (through payroll deduction) in our community.
 - Most managed locally, some are not.





2020-2021 Community Campaign

Combined Campaign Categories	2020-2021 Goal
Community Campaign:	
Workplace Giving Campaign	\$465,000
Special Event(s)	\$75,000
Community Giving (online, individual, direct mail, etc.)	\$30,000
Impact Initiative Grants and Contracts	\$350,000
Youth Leadership Cabinet Campaign	\$11,000
TOTAL:	\$931,000
SECC (State Employee Charitable Campaign)	\$550,000
COMBINED TOTAL:	\$1,481,000



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Planning Your Company's United Way Campaign

Best Practice Activities



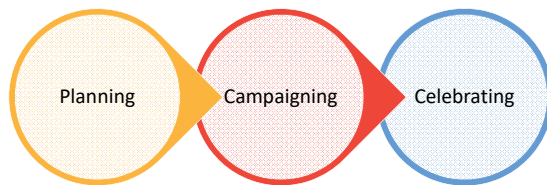
Campaign Best Practice Checklist

- ☐ Secure Leadership Support
- ☐ Build Your Team
- ☐ Connect with United Way's Mission
- ☐ Set the Fundraising Goal
- ☐ Plan the Campaign Activities
- ☐ Execute the Plan
- ☐ Report Results to UWBV
- ☐ Thank and Acknowledge
- ☐ Engage Throughout the Year

The steps for
success remain the
same, even in
today's world.

Just the way you
accomplish them
may need to adapt.

Three Phases of Campaign



Secure Leadership Support

- Critical to the success of your efforts
- Have Company Leadership share words of support:
 - Letter/email
 - Short, informal video message
 - Speak at rallies
- Check with Leadership for:
 - Giving Incentives (Fair Share Day (1%), Drawing Prizes, etc.)
 - Corporate Match and/or Gift



Build Your Campaign Team

- Campaign Team helps ensure the Campaign reaches all corners of your company!
- What is appropriate for your company size and structure?
 - United Way Chair/Champion
 - United Way Committee
 - 1 person from each department/campus/branch office
 - Roles with different focuses (rallies, fundraisers, logistics)
- Helpful to have support when you can't all be together in the same place at the same time.





Connect with the Mission & Agency Tours

- Connect your planning team to United Way's mission
 - United Way Staff are happy to meet with you to help! In-person or via Zoom/Conference Call.
- Partner Agency Video Tours
 - The BEST way to SEE United Way's Impacts
 - Have made them virtual this year and available through our Campaign Toolkit webpage
 - 2 to 4 minute video highlighting organization and program
 - Recommend sending links to 2 – 3 to employees, or 1 link per week/communication touch-point





Setting the Goal

- Use historical giving information, don't forget to stretch a bit
 - Available from United Way
- Tips on setting goals:
 - Financial Goal – people need something to aim for and reach
 - Participation Goal – 100% asked instead of 100% giving
 - Consider the situation at your work due to COVID-19 response
 - Some may not be able to give as much if hours have been cut
 - Some may be more generous if their employment has not been impacted





Campaign Tools and Materials

- Campaign Toolkit: <https://uwbv.org/campaign-toolkit/>
- Internal Coordinator Guide
 - "Campaign Notes" Worksheet – pg 11
- Materials:
 - Pledge Forms, Pledge Envelope
 - Info Cards
 - Posters
 - Thermometer Posters
 - Pens, Chip Clips, Stickers
 - Thank You Notes



Pledge Forms

- Paper Pledge Forms or Digital Pledge Forms (customizable)
- Methods to Give:
 - Payroll Deduction
 - One-Time gift of cash, check, credit card or payroll deduction
 - Online @ uwbv.org/donate
- UWBV's Paper Pledge Forms: Triplicate copies
 - Donor
 - Payroll Office
 - United Way



Pledge Form

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DONOR
Name (please print): _____
Mr. Ms. Mx. _____
Home Mailing Address: _____
City _____ State _____ Zip _____
Street Address: _____
Email (personal recommended): _____
Phone Home: _____ Cell: _____
Employer Name: _____
Signature: _____ Date: _____

ONE-TIME GIFT
Please accept my one-time gift of \$ _____
☐ My CASH gift is enclosed. ☐ PAYROLL DEDUCTION.
☐ My CHECK is enclosed. ☐ Please CHARGE my card.
Card number: _____ Exp. Date: _____ CVC: _____

PAYROLL DEDUCTIONS
I want to invest the following amount per paycheck:
Gift Per Paycheck: ☐ \$100.00 ☐ \$150.00 ☐ \$200.00 ☐ \$250.00 ☐ \$300.00 ☐ Other \$: _____
I pledge _____ % of my salary for a total of \$ _____
☐ **LEADERSHIP GIVER**
Your investment of \$2,000 or more automatically qualifies you for membership in the Leadership Giving Society. How would you like your name to be listed?
☐ One Time ☐ Quarterly ☐ Monthly = TOTAL GIFT \$ _____

- Please make sure donor signs form
- Confirm "Paychecks Per Year" is accurate
- Confirm a "Total Annual Gift" is completed
- Make sure donor and United Way get a copy of pledge form

THANK YOU! _____
United Way of the Brazos Valley United Way



Digital Resources to Support You

www.UWBV.org/CampaignToolkit

- Recorded Campaign Meeting messages
- United Way PowerPoint - Customized
- Partner Agency Virtual "Tours"
- LE Connection Stories
- Digital Pledge Forms
- Digital Pledge Envelope
- Sample Communication Emails





Digital Campaign Guide Make it S.O.C.I.A.L (Pg. __)

- **S**hort & Sweet
- **O**verall Goals
- **C**ommunicate
- **I**mpact
- **A**ccelerate Success with Games
- **L**ive Updates on Goal Progression





Campaign Rally – In-Person

Outline – 10-15 min ideally

- Intro / Company Perspective
- UWBV shares United Way message
 - Show Campaign Video (optional)
- Agency Speaker shares Impact Testimonial
- Loaned Executive shares Connection Story
- Invitation to Give by UWBV Staff, Company Leadership
 - Review Pledge Form details

Checklist

- ☐ Who will conduct Intro – Leadership or Internal Coordinator
- ☐ Schedule with United Way: United Way Rep, Loaned Executive and Agency Speaker
- ☐ A/V Available?
- ☐ Materials: Pledge Forms, Pens
- ☐ Who makes the ask – UWBV or Leadership?
- ☐ Submission information and deadlines





Campaign Rally - Virtual

Outline – 10-15 min ideally

- Intro / Company Perspective
- United Way Message video
 - Show Campaign Video (optional)
- Agency Tour Video
- Loaned Executive Connection Story
- Invitation to Give by Company Leadership
 - Campaign PowerPoint with details specific to your company
 - Review Pledge Form details

Checklist

- ☐ Short introduction by leadership / IC (Zoom, email or recorded video)
- ☐ Select the United Way Message appropriate version for your employees
- ☐ Select max of 3 Agency Tours to share
- ☐ Materials: Pledge Forms, Pens
- ☐ Who makes the ask – IC or Leadership?
- ☐ Submission information and deadlines

Virtual rallies can via email, or hosted through Zoom/Google Meet, etc. If done via live, United Way staff is happy to join to provide United Way message and support to you.



Submit Results to United Way

- Complete Pledge Envelope information and tallies
 - Ensure all pledge and gift information is complete and enclosed
 - Pledge Forms, Cash, Checks, etc.
 - Can be 100% Paperless and Submitted via Toolkit Webpage
- Seal envelope and initial across flap
- Deliver to United Way
 - Mail (please do not mail cash)
 - Drop off: Monday – Friday, 8:30 – 5:00
 - Call for Pick-Up from United Way



WHEN COMPLETED, PLEASE FORWARD TO UNITED WAY IMMEDIATELY!

Company _____ No. of Employees _____
Billing Address _____
City _____ ST _____ Zip _____
Telephone Number _____
Name of Preparer of Report _____
Email _____
This report is: ☐ Partial (additional reports to follow) ☐ Final



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Instructions: Please complete the following chart for only the information enclosed in this envelope.

	Total Pledge Amount Enclosed (\$)	# of Givees	Instructions
1 Giving Option			A. Enclosed: Return copy of Pledge Form to United Way B. Enclosed: Return copy of Pledge Form to United Way C. Enclosed: Return copy of Pledge Form to United Way
40 Payroll Deductions			A. Enclosed: Return copy of Pledge Form to United Way B. Enclosed: Return copy of Pledge Form to United Way C. Enclosed: Return copy of Pledge Form to United Way
41 Cash/Check/Other One-time Gifts			A. Enclosed: Return copy of Pledge Form to United Way B. Enclosed: Return copy of Pledge Form to United Way C. Enclosed: Return copy of Pledge Form to United Way
42 Credit Card Gifts			A. Enclosed: Return copy of Pledge Form to United Way B. Enclosed: Return copy of Pledge Form to United Way C. Enclosed: Return copy of Pledge Form to United Way
43 Other (Online Gifts)			A. Enclosed: Return copy of Pledge Form to United Way B. Enclosed: Return copy of Pledge Form to United Way C. Enclosed: Return copy of Pledge Form to United Way
44 Fundraising / Special Events			A. Enclosed: Return copy of Pledge Form to United Way B. Enclosed: Return copy of Pledge Form to United Way C. Enclosed: Return copy of Pledge Form to United Way
2 Sub Total			Sum of lines a + b + c + d + e
3 CORPORATE GIFT / MATCH		N/A	Enclose copy of Pledge Form to United Way
4 GRAND TOTAL			Sum of lines 2 + 3

THANK YOU!!

Signature of Preparer: _____ Date: ____/____/____





Celebrate, Thank and Acknowledge

- Promote results to your co-workers to celebrate your success!
- Send Thank You notes, gifts to United Way Team members, payroll staff
- United Way Acknowledgements:
 - Gifts through Payroll Deduction – Pledge Form, Thank You Card
 - Cash, Check, Credit Card Gifts - Letter





Engage Throughout the Year

- United Way engagement can be ALL YEAR LONG
- Get a team together for volunteer events:
 - Day of Action – August 12
 - Boo! Book Bash – October
 - Jingle Book Bash – December
 - Host your own Book Drive in the Spring
 - Join a United Way committee
 - Campaign / Learned Executives
 - Branding and Communication
 - Grant Review Panel
 - Board of Directors

Dates and plans are pending due to COVID-19.





Checklist for HR/Payroll

- ☐ Prepared for Payroll Deductions in payroll system
- ☐ Confirm dates Payroll Deductions will begin/end
- ☐ Confirm payment to UWBV method
 - ☐ Mailed directly from your site, or another location/United Way
 - ☐ Does UWBV need to provide invoice/documentation to issue payment?
- ☐ Received a copy of all payroll deduction pledge forms at the end of pledge period





Next Steps

- Contact Maggie to schedule a planning session for your campaign
 - mgray@uwbv.org
 - We will review the planning process and help you in your efforts
- Build your team and engage your Leadership
- View Partner Agency Video Tours and Campaign Rally Videos



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THANK YOU!