



EEC

2019 GUIDE



YOU ARE MAKING AN IMPACT IN OUR COMMUNITY

For over

150,000



living in poverty in the Mid-South, it isn't a lack of effort that keeps them from achieving their goals, but rather a lack of access to resources and services.

Our United Way's annual campaign is about bringing people together to address our community's most important issue - Mid-South poverty. As a United Way Employee Engagement Champion, or key member of the resource development campaign, you stand with thousands of other local volunteers who are making a measurable impact in the lives of the people in our area.

Due to the success of the workplace campaign, the generosity of our donors, and the dedication of our volunteers, United Way of the Mid-South is able to support a network of nonprofit organizations and hundreds of programs that are hard at work, every day, improving education, financial stability and health to reduce poverty, right here in the Mid-South.

This handbook is designed to lead you step-by-step through a United Way campaign; offering tools, tips, and best practices to ensure your success. While this handbook offers a good overview for a United Way representative, it does not answer every question. More resources are available by contacting your United Way Resource Development Manager or by visiting our website at www.uwmidsouth.org.

Thank you for volunteering to be a part of our United Way campaign. By giving your time, talent, and treasure - and spreading the word - you're helping to advance individuals and families from poverty to prosperity. Together, we can inspire hope, create opportunities, and help reduce poverty across our area.

TOGETHER, WE CAN DO MORE GOOD THAN ANYONE OF US CAN DO ALONE.



YOUR ROLE AS AN EMPLOYEE ENGAGEMENT CHAMPION (EEC)

WHAT IS AN EEC?

An EEC is a person who helps his/her organization's work with United Way of the Mid-South and leads the company's United Way campaign through planning, implementation and evaluation. As an EEC, you are the face of United Way at your company.

WHAT DOES AN EEC DO?

- Educates employees about United Way and provides opportunities for them to get engaged.
- Assembles a committee of ambassadors - your colleagues at work - who help you build support for United Way.
- Sets goals to increase giving and volunteering (number of participants, monetary goals).
- Holds a United Way kickoff and coordinates other special events.
- Determines if your company will donate through pledge forms or e-pledge. If using e-pledge, completes the e-pledge document.
- Distributes United Way materials and pledge forms to colleagues. Prepares and submits completed pledge forms to your United Way Resource Development Manager.

BENEFITS OF BEING AN EEC:

- Showcase leadership and project management skills at work.
- Network with colleagues at your organization and other companies across the Mid-South.
- Create a positive impact in your community.



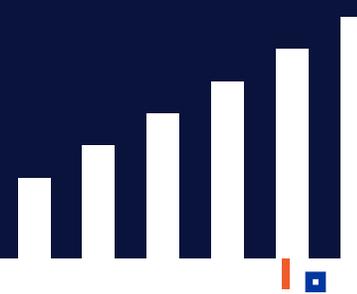
CAMPAIGN GLOSSARY:

YOUR TEAM AT WORK

- **Campaign Committee:** a group of people at your company who help you educate colleagues about United Way and build support and excitement around the campaign.
- **Leadership Chair:** a Leadership Giver (contributes \$500 or more) at a company who encourages new and existing leadership givers during the campaign through special presentations, discussions and meetings.

YOUR TEAM AT UNITED WAY

- **Resource Development Manager:** a United Way employee who assists you with campaign efforts, including year-round activities.
- **Campaign Representative (CR):** a staff member on loan from a United Way corporate partner or seasonal United Way team member who helps the Resource Development team during campaign season.
- **Major Gifts Director:** a United Way staff member who helps plan leadership giving strategies, events, etc. to recruit and recognize individual givers who are members of the Tocqueville Society (who contribute \$10,000 or more).





ABOUT OUR UNITED WAY



REV. KENNETH S. ROBINSON, M.D.
President and CEO
United Way of the Mid-South

OUR FOCUS IS ON THE MID-SOUTH'S GREATEST CHALLENGE: POVERTY.

United Way of the Mid-South is in its third year with laser focus on our region's single largest issue: poverty. The impacts we make in local education, financial stability and health are all contributing to the work of advancing individuals and families from poverty to prosperity.

DRIVING THE DREAM

United Way has focused attention on poverty reduction that will lead to economic prosperity for individuals, families and the Mid-South. *Driving The Dream* is the transformative human services system of care designed to move people from where they are to where they dream to be. The goal is a Mid-South in which all people have equitable access to resources and supports needed to achieve their hopes and dreams by fostering a community where the people we serve are hopeful, resilient and self-sufficient. We have adopted a two-generational, whole family service delivery model. and as part of this effort, we are promoting best practice models proven to move the needle on root cause issues that perpetuate poverty. We are equipping our partners with the tools and resources they need to change both culture and practice for the better.



J.T. YOUNG
President and CEO
MLGW
General Campaign Chairman 2019-20,
United Way of the Mid-South

WHAT HAPPENS WHEN I MAKE A DONATION TO UNITED WAY?

United Way of the Mid-South knows there are many organizations you can support, and we appreciate your trust. We're proud that Forbes magazine ranks United Way Worldwide as one of the nation's top charities and reports on our strong commitment to transparency and high standards of ethical practice.

Your gift to our United Way of the Mid-South is paired with the gifts of your coworkers, neighbors, friends and family members to create a tremendous force for our common good. Scores of local volunteers - people like you - are trained to evaluate and make recommendations on our grant-making through our United Way allocations process.

These volunteers learn about the needs of our community, examine the operations and budgets of local nonprofit agencies and programs, and make the extremely difficult decisions of how much should be invested in which programs for the greatest impact on education, financial stability and health, while positively impacting the issue of poverty.

Our United Way Board of Directors (also made up of local, unpaid volunteers) reviews and approves our recommended grants as yet another safeguard for your donation. At United Way, we are committed to multiple levels of oversight to ensure your gift is used wisely, effectively, and in ways that have the greatest impact on lives of Mid-Southerners.





39%

of Memphis' children live in poverty.



YOUR GIFTS CREATE AN IMPACT IN YOUR COUNTY.

The donations you make to United Way of the Mid-South stay in your community. United Way of the Mid-South serves our eight-county area: Fayette, Lauderdale, Shelby and Tipton counties in Tennessee; Crittenden County in Arkansas; and DeSoto, Tunica and Tate counties in Mississippi.



INITIATIVES & PROGRAMS

UNITED WAY OF THE MID-SOUTH PROVIDES HELP IN WAYS YOU MAY NOT EXPECT.

In addition to funding local services, programs and agencies through direct cash grants, United Way provides important services to our local community such as:

DRIVING THE DREAM

United Way of the Mid-South has created a functional network of effective community-based services and supports to help families advance from where they are to where they dream to be. *Driving The Dream* agencies adopt uniform strategies and tools to coordinate services and provide a holistic, client-centered model of care designed to move participants out of poverty to economic security; through a common intake assessment tool, seamless inter-agency referrals, and a shared client database. *Driving The Dream* helps families identify their own goals, create a clear road map to achieve them, and advance toward personal success and "a life of their choosing."

FREE TAX PREP PROGRAM

Mid-Southerners living in poverty or living with low income can receive FREE tax preparation and filing through United Way's Free Tax Prep program. In the last tax filing year, it brought the Mid-South economy nearly \$13 million in tax refunds including \$4.7 million in federal credits. It is a huge part of our work to reduce Mid-South poverty, resulting in families getting a financial boost. It saves Mid-Southerners millions in fees and ensures they claim all the credits for which they are eligible. Refunds from this program often result in 20% or more of a household's annual income.

FAMILYWISE DISCOUNT PRESCRIPTION CARDS

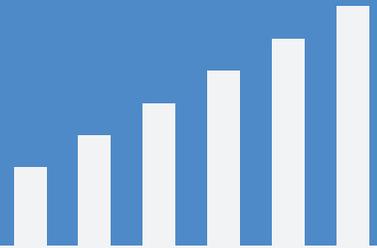
Medical expenses can force lower income households into terrible decisions between either purchasing medicine or paying bills / buying food. United Way's partnership with FamilyWise discount prescription cards helps people save on many prescription medications regardless of insurance status or income. For more information, visit www.familywise.org.

2-1-1 HELP LINE

United Way's partnership with the Memphis Public Library system provides an important call center to connect people in need with services that can help. Trained 2-1-1 operators can listen to the details of a person's situation and refer them to nonprofit, government or other services that may be able to help. 2-1-1 helps cut through the red tape of searching for the right program and connects people in need to services that can make a difference.



BEST PRACTICES & STEPS TO SUCCESS



RUNNING A SUCCESSFUL UNITED WAY CAMPAIGN CAN BE A FUN, SIMPLE AND REWARDING EXPERIENCE.

Here are some best practice ideas and steps to get your United Way campaign to succeed. Reach out to your United Way staff for help with planning and execution.

GET CONNECTED

- Contact your United Way Resource Development Manager to learn how they can assist you.
- Talk to your company's CEO or senior leadership about approving a campaign committee, budget, and/or allowing company time for campaign meetings and possible activities.
- Discuss the possibility of matching a percentage of employee gifts with a corporate contribution.
- Develop a strategy for engaging top managers and leaders in the campaign and have them support, endorse and participate in campaign events.
- Understand what employees feel is important in the community and how United Way can make a difference in the Mid-South.

RECRUIT A STRONG CAMPAIGN COMMITTEE

- Build a diverse campaign team including individuals from multiple departments and from every level within the organization, as appropriate. Those with previous United Way involvement would be strong candidates!

- Invite your United Way Resource Development Manager to campaign committee meetings for questions, ideas and other support.

DEVELOP YOUR CAMPAIGN PLAN

- Set up a campaign timeline. The strongest campaigns are usually the shorter ones - keeping it to a duration of about two weeks is a best practice because it keeps the momentum strong.
- Set a campaign goal. Identify areas that could improve and set measurable goals to achieve. Your United Way Resource Development Manager can help you identify areas of improvement and goals.
- Consider some incentives that can be used to entice new donors and encourage existing donors to increase their contributions.
- Choose campaign strategies and approaches that fit your company culture.
- Develop Leadership Giving strategies that recognize the importance of leadership gifts (\$500 and up) and their impact on our community. Ask the CEO to endorse the importance of leadership gifts and ask him/her or a senior executive leader to spearhead this part of the effort.
- Identify campaign roles and which team members will be responsible for them.
- Make sure to collect all United Way campaign materials from your local United Way Resource Development Manager.

SET A GOAL

- A great way to grow your campaign is to focus on increasing the number of people who are giving and/or encouraging people to give more. Your United Way Resource Development Manager can help you analyze your current giving and create goals that make sense. Here are two great formulas to help you set your goal.

$$\text{Desired Participation } \underline{\hspace{1cm}} \% \\ (\underline{\hspace{1cm}} \times \underline{\hspace{1cm}} \%) \times \$\underline{\hspace{1cm}} =$$

$$\frac{\hspace{1cm}}{\hspace{1cm}} = \frac{(\# \text{ of employees} \times \text{participation}) \times \text{last year's avg. gift}}{\text{potential goal}}$$

$$\text{Desired Per Capita Gift } \$ \underline{\hspace{1cm}}$$

$$\frac{\hspace{1cm}}{\hspace{1cm}} \times \underline{\hspace{1cm}} = \$ \underline{\hspace{1cm}}$$

of employees x per capita gift = potential goal

LAUNCH AND PROMOTE THE CAMPAIGN

- Promote your upcoming United Way campaign a few days before launching with posters, flyers and various types of communication, for example, a CEO memo on a company newsletter.
- Invite all staff to a kickoff event that communicates management support and campaign goals. Consider having a United Way speaker at the event.
- Announce the campaign at various department and staff meetings and send out reminders and updates via email.



PRESENTATIONS DURING CAMPAIGN

- Ask your United Way Resource Development Manager to speak during employee meetings about the mission, programs, resources and impact of United Way.
- Tag on to an existing meeting to make efficient use of company time and keep the United Way segment to 20 minutes or less.
- During the presentation, communicate campaign details such as timeframe, incentives, deadlines, and other events.
- Promote the meeting and presentation to employees. Follow up with employees who missed the meeting or presentation.

PROMOTE LEADERSHIP GIVING

- Discuss Leadership Giving (\$500+) matching opportunities.
- Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO).

MAKE THE ASK

- Make sure everyone is asked to give through kickoff, department meetings and one-on-one conversations. The number one reason people don't give is because they were never asked!
- Show donors the impact that their contribution makes. Knowing that their gifts truly make a difference in the community is a strong motivation to give back.

- Be prepared to answer questions about United Way to help employees understand how United Way works. Your United Way Resource Development Manager can help you with this part.
- Have the campaign committee personally distribute pledge forms and ask co-workers to join them in supporting United Way. Prepare them to talk about why they support the United Way.
- Make sure employees know when the campaign ends, where to turn in their pledge forms, and how they can get more involved.

MONITOR AND REPORT CAMPAIGN PROGRESS

- As the campaign progresses, keep a running total of collected pledges and compare them against the goals identified by the campaign committee.
- Provide regular campaign progress updates to employees through various communications.
- Hold a mid-campaign review to check progress toward goal and identify courses of action to reach your goal.
- Make personal follow-ups with individuals that have not turned in their pledge forms.

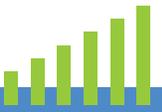
CAMPAIGN WRAP-UP

- Tally your results and schedule a meeting with your United Way Resource Development Manager to complete all required paperwork, if necessary.
- Report the campaign final total to all employees and leadership and compare to previous year.
- Hold a final campaign committee meeting to evaluate the campaign efforts and results.
- Distribute any incentives and thank everyone! Send thank-you emails, a thank-you memo from the CEO, and hang thank-you posters. Don't forget to send a special thank-you to the members of your campaign committee!

YEAR-ROUND ENGAGEMENT

- Include United Way material in new hire packets to introduce new employees to the cause, and include materials in retiree packets to allow retirees to continue their involvement.
- Share United Way of the Mid-South updates and news with employees year-round so they can see the impact of their contributions.
- Arrange a United Way of the Mid-South volunteer project to further engage the workplace.





UNITED WAY WORKPLACE DEVELOPMENT DRIVE CHECKLIST

PLAN

- Meet with your United Way Resource Development Manager and begin planning your campaign.
- Attend United Way's Employee Engagement Champion Training.
- Go to uwmidsouth.org for ideas and sample materials.
- Secure CEO or senior management support.
- Establish campaign goals including dollar amount and participation percentage.
- Recruit and train your campaign team.

GEAR UP

- Establish a timeline for campaign activities.
- Begin campaign promotion with posters and advance kickoff emails to staff.
- Send letter from management and organized labor (as appropriate) to employees.
- Order campaign supplies and prepare your campaign materials.
- If applicable, update your online pledge site and/or intranet – consider adding United Way program information.

RUN

- Conduct a pacesetter campaign for leadership givers. Ask your United Way Resource Development Manager for information.
- Hand out pledge forms and/or email information about online giving to employees.
- Send follow-up emails every few days to keep up enthusiasm. Include updates, news and success stories.
- Find stories about what United Way is doing at uwmidsouth.org/news.
- Hold meetings and fundraising events (e.g. bake sale, raffle, soup contest).
- Give employees the opportunity to learn more about United Way by coordinating speakers, volunteer activities or agency tours.

CLOSE

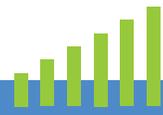
- Send a reminder email that your campaign is concluding and pledge forms need to be submitted.
- Collect pledge forms.
- Submit contribution forms and final reports/data to your payroll department.
- Announce campaign results to your employees.
- Thank employees with a celebration event, letter, email, etc.
- Thank your campaign team, leadership contributors and other special groups.
- Gather feedback and notes for next year.
- Choose an Employee Engagement Champion, set next year's kickoff date, and provide this information to your United Way Resource Development Manager.

ONGOING

Stay connected to United Way throughout the year!

- Learn more about our work at uwmidsouth.org
- Follow us on:
 - Facebook  [uwmidsouth/](https://www.facebook.com/uwmidsouth/)
 - Instagram  [uwmidsouth/](https://www.instagram.com/uwmidsouth/)
 - Twitter  [uwmidsouth/](https://twitter.com/uwmidsouth/)
 - LinkedIn  [company/uwmidsouth](https://www.linkedin.com/company/uwmidsouth/)





SAMPLE LETTERS TO ENCOURAGE SUPPORT

LETTER FROM CEO TO EMPLOYEES (SAMPLE 1):

Dear _____:
(Employee Name Here)

As you know, our company has supported United Way of the Mid-South for many years. Its work to address our local poverty problems is important to making the Mid-South an even better place to work and live.

Last year, your support of United Way made a meaningful impact more than 350,000 times throughout our eight-county area.

During the next few weeks, you will be hearing a great deal about United Way services and programs.

United Way represents the largest and most efficient system of providing people-to-people help. Through United Way, local agencies and services receive the support and assistance they need to help countless people — and advance individuals and families from poverty.

In support of this very important effort, you will be asked to attend a United Way presentation at which time you will be asked to pledge a contribution to United Way. Your contribution is a personal decision, but I hope that you will be generous, as our employees have been in the past.

Through our payroll deduction plan, you have a convenient, easy and practical way to make your contribution.

I have made a pledge to United Way, and I hope you will give strong consideration to doing the same.

Together, we can do more good than any one of us can do alone.

Sincerely,

(CEO Name Here)

LETTER FROM CEO TO EMPLOYEES (SAMPLE 2):

Dear _____:
(Employee Name Here)

We all wear a number of different hats in our daily lives — we're alternately spouse, parent, employee, union member, citizen. Successfully juggling these roles is a tough job because each role requires decisions and actions.

Each year, we're asked to wear yet another hat, that of United Way contributor. It's one of the nicer roles we get to assume!

As United Way contributors, we don't need to make a lot of difficult decisions about who needs the most help — United Way volunteers have already done that. They've spent countless hours studying local needs, determining what agencies best meet those needs and distributing funds accordingly.

Last year, your support of United Way made a meaningful impact more than 350,000 times throughout our eight-county area.

When we give to United Way, we know our money is going where it can help most. And we know our contribution keeps on working 365 days a year. With payroll deduction and United Way, giving — and helping — has never been easier.

We hope you'll continue supporting United Way as you have so generously done in the past.

Together, we can do more good than any one of us can do alone.

Sincerely,

(CEO Name Here)



LETTER FROM ORGANIZED LABOR

Dear Brothers and Sisters:

The labor movement and United Way have a lot in common. Both exist to help people. Both have the support of working men and women throughout the country. And both believe that every individual should be treated with dignity and respect.

Last year, your support of United Way made a meaningful impact more than 350,000 times throughout our eight-county area.

For over a century now, people have given their time and money to study local needs and have done their best to meet those needs through United Way. The result is one of the finest voluntary efforts in the world.

United Way of the Mid-South is addressing the tremendous challenge of local poverty by creating targeted results in education, financial stability and health. Its focus is to advance the common good for all. To do that, United Way needs to increase its financial resources and to increase the number of people who serve as volunteers.

When you are asked to give to United Way this year, please be generous. But United Way volunteers make sure we use our resources as wisely as possible. This United Way has been doing that for over 95 years.

With your help, United Way can continue in the years ahead to serve the needs in our community and all over America.

Together, we can do more good than any one of us can do alone.

Sincerely,

(Organized Labor Leader Name Here)

LETTER TO RETIREES:

Dear Fellow Retiree:

As retired employees of [COMPANY], we are fortunate. Our careers have blessed us with the numerous rewards we enjoy today. This year, we can share our good fortune with others through United Way of the Mid-South.

What we give to United Way is only part of what it takes to provide health and human-care services to hundreds of people each day. Yet, to those in need, it makes all the difference in the world.

Last year, your support of United Way made a meaningful impact more than 350,000 times throughout our eight-county area.

Giving through United Way is the best way to help the most people. The needs of people in the Mid-South change all the time. United Way and United Way-supported organizations are working to discover and help fill these needs. One of the fastest growing segments of this nation's populations is its senior citizens, and many United Way supported organizations are in the forefront of the effort to address the needs of this special group. So you can see why our financial support is so important.

But there's another way we can help — by giving our time. What better way to fill our leisure time than by caring for others. You get a lot in return.

People helping people... United Way's campaign helps keep this spirit alive in the Mid-South. Let's help United Way continue to work for all of us.

Together, we can do more good than any one of us can do alone.

Sincerely,

(Retiree Leader Here)

These letters are only offered as suggestions - they can be modified to fit the culture of your organization as necessary. Please feel free to contact your United Way Resource Development Manager to provide guidance and/or assistance in the composition of letters on behalf of United Way.



PROCESS FOR COLLECTING PLEDGES

DRIVING
THE DREAM
Out of Poverty



THE FOLLOWING INFORMATION IS REQUIRED IN ORDER FOR THE PLEDGE FORM TO BE PROCESSED:

- Name and address
- Total annual gift, form of payment (i.e. payroll deduction, credit card, etc.)
- Signature and date
- Email address, so we can send updates on how your donation is being invested in our community

WHO KEEPS WHICH COPY OF THE PLEDGE FORM? (PAPER VERSION)

- **White** copy goes to your organization's human resources or payroll department
- **Yellow** copy goes to your United Way Resource Development staff member or Campaign Representative
- **Pink** copy goes to the donor

WHAT SHOULD I DO AT THE END OF THE CAMPAIGN?

- Compile all pledge forms with payments (if payment is in the form of a check, cash, credit card, please place in the green envelope),
- Compile all payroll deduction pledge forms in a white envelope
- Double-check to make sure the steps listed above have been completed
- Contact your United Way Resource Development Managers or Campaign Representative to schedule a pick-up date and time for the pledge forms, donations and other paperwork. The Resource Development Manager or Campaign Representative can help you complete paperwork on-site if necessary.

WAYS TO SAY THANKS

Saying thanks and acknowledging participation are crucial to a campaign's success. Here are a few simple ways to thank your organization's Campaign Committee and people who helped the campaign effort:

- Allow people who return their pledge forms to participate in a casual or jeans day
- Provide employees with paid time off to volunteer with United Way or one of its agency partners
- Hold a company-wide breakfast or lunch; have senior staff serve and thank employees
- Send a thank-you letter from the CEO to campaign committee members and contributors
- Host a special reception or recognition ceremony
- Thank campaign committee members by holding a special coffee break

UNITED WAY OF THE MID-SOUTH

Collateral for EECs:
<http://www.uwmidsouth.org/campaign-toolkit/>

For Questions Contact:
Mary Sexton,
Vice President of Resource
Development
Mary.Sexton@uwmidsouth.org

1005 Tillman Street
Memphis, TN 38112
901.433.4300
www.uwmidsouth.org





**TOGETHER, WE CAN DO MORE GOOD
THAN ANY ONE OF US CAN DO ALONE.**

UNITED WAY OF THE MID-SOUTH
901.433.4300 | 1005 Tillman Street | Memphis, TN 38112

UWMIDSOUTH.ORG

