

1. Become an Informed Coordinator

The most successful campaign coordinator will be the one who genuinely believes in Char-Em United Way's mission. If you are informed about what programs we support and why, you will be more confident about this endeavor before taking it to other employees or department heads to ask for their help and their donations.

Keep the information handy regarding our standards for accountability and financial responsibility, so you can refer to it during the course of the campaign. Express your enthusiasm for the amazing results of company participation: if a large number of the employees pledge only \$1 a paycheck - or 1 hour per pay period - that's okay because *together* those dollars will add up. *Together* they've donated enough to keep one child in a quality pre-school program; provided a senior companion for one older person for a year; or provided critical counseling services!

Char-Em United Way and our funded programs touch approximately 30,000 lives per year! But how does an agency become approved for funding? Each year the Board of Directors reviews current community needs and updates our funding priorities. 0



EDUCATION
HELPING CHILDREN AND YOUTH
ACHIEVE THEIR POTENTIAL

- ◆ Preschoolers develop on track, ready to succeed in school.
- ◆ Students graduate from high school.
- ◆ Youth develop life and work skills.



INCOME
PROMOTING FINANCIAL
STABILITY AND INDEPENDENCE

- ◆ Supporting basic needs while increasing financial education.
- ◆ Enhancing individual and families' financial stability, education, and vocational skills.
- ◆ Helping community members overcome disasters and emotional or financial crises.



HEALTH
IMPROVING PEOPLE'S HEALTH

- ◆ Community members have access to basic and preventative health services
- ◆ Community members are knowledgeable about being healthy and avoiding risky behaviors.
- ◆ Seniors and disabled people maximize their self-sufficiency.

Agencies that apply meet rigorous financial requirements verifying their fiscal responsibility (that means we look at their books!), and show that their programs fall into our standards for **measurable outcomes** (this means they must have the figures to prove their programs are working!). Our agency partners must demonstrate how many people they will help and in what way. If, for any reason an agency does not meet all of these standards, we are not able to include them in our partnership.

Our Citizen Review Panel of 35+ community volunteers reviews all the applications and conducts interviews before making funding recommendations to the Board, which makes the final decisions. Mid-year and year-end reports ensure accountability. We want everyone who donates to United Way to be confident that their contributions are more significant because they are multiplied with the contributions of other co-workers, and by wise investments, they grow simply by the nature of the assistance given. One person helped through United Way will help many others with the results of their own success. We are proud to be good stewards of our donors' investments.

Our **2010-2011 Community Impact Report** is available on our website. We also have many human interest stories from our partner agencies which can be shared with your co-workers in presentations, newsletters, or other ways.

Our 2011-2012 Funded Partners and Programs are described on the detailed materials provided to you.

United Way Frequently Asked Questions:

What is Char-Em United Way?

Char-Em United Way is a local, nonprofit organization that focuses resources to solve the most critical human needs in our community. It has been a proven partner in Charlevoix and Emmet Counties for nearly 70 years.

Who runs Char-Em United Way?

It is governed by a volunteer Board of Directors. Local volunteers oversee every aspect of the organization. The Board monitors United Way's operation and requires that it run in accordance with fiscally sound and accepted practices. United Way's accountability ensures that funds are prudently managed. An annual financial audit is conducted by an outside CPA firm.

What requirements must United Way agencies meet?

- Non-profit health or human service agency serving Charlevoix or Emmet County.
- Document cost-effective delivery of high-priority programs and services.
- Demonstrate sound financial and administrative management practices.
- Comply with all applicable laws.
- Demonstrate impact through measurable outcomes - in other words, get results.

What is this year's Campaign Goal?

\$380,000, a 4% increase over what we raised last year. If we reach our goal, the Frey Foundation will provide a challenge grant of an additional \$20,000.

Where does the money go? What is United Way's overhead?

What's Raised Here, Stays Here - 98.5% stays in our community. Last year, we invested over \$268,800 in local agencies. Other funds support our initiatives — Volunteer Connections, Day of Caring, Project Connect, Stuff the Bus, 2-1-1 and more. Administrative and fundraising costs are less than 15% of our budget.

Why should I give if I haven't been helped?

A growing number of our most vulnerable residents - abused women and children, our elderly, homeless families, those with handicaps and mentally ill - cannot help themselves. There is a great need in our community for the services offered by the United Way partner agencies. You never know when a family member, neighbor, friend or even you may need the services provided by a United Way partner agency.

If I designate to a specific agency, do they really get the money?

Yes, we pass on designated gifts. Partner agencies receive the full designation, less an allowance for pledge loss. Non-partner agencies are charged a modest fee for fundraising and processing expense, based on actual costs. However, we *discourage donors from designating*. We want to give our Citizen Review Panels the greatest flexibility in making investments which best meet community needs.

What is Char-Em United Way's relationship with United Way of America?

Like approximately 1,276 local United Ways across the country, our local United Way is separately incorporated and is locally governed. United Way supports United Way Worldwide through membership investments of 1% of donations. In return, Char-Em United Way receives national services that include staff training, community research information, campaign products, advertising and consultation.

What is the difference between a United Way and a United Fund?

United Fund is a group of people raising funds for local organizations, but do not have the same strict standards as a United Way. It isn't a member of United Way Worldwide.

2 Seek Help

Don't feel you have to fly solo on this if you have a large company! Ask a friend or department head to help you by co-chairing your campaign efforts. Find people who are well-liked and respected by co-workers. If there is a union in your workplace, involve union leadership. Include someone from each department and/or building. Working with at least one more person, you are likely to come up with some fun events (maybe some we haven't thought of) things you think your co-workers will respond to.

We're here for you!

No takers to your request for a co-chair? No Problem! Call our office at 231-487-1006 to find a volunteer support person.

Participation by upper management is essential for a successful campaign. We have already solicited their support or we wouldn't be permitted to conduct a campaign. Ask them to officially endorse it with a personal letter, or a speech at the presentation and for approval to purchase or obtain incentive items to be used in the campaign. Let them know ahead of time you may be coming to them to ask permission to run events, or to purchase food or rewards. They may give you a budget for these things. Also find out ahead of time whether if the firm provides a matching gift or corporate contribution. Ask the boss to join you in making a lead gift.

Ask us for help when you need it. It's in our best interest to know you're not floundering with this responsibility, and we want you to achieve your goal with as little stress as possible!

3. It's All Material - Essential Supplies You Need

We will provide you with:

- ◆ Brochures: It's important to make sure everyone in the workplace is given a brochure so they will have our information to look over.
- ◆ Video: A DVD copy of our campaign video to show at meetings, in the break room, on the intranet, etc.
- ◆ Pledge Forms: Each employee will need a pledge form, and you will want extras to keep for your Human Resource Department to give to new employees during the year.
- ◆ Report Envelope: When the campaign is over, and the pledge forms are all turned in and processed by Payroll/HR, turn in:
 - The top copy of each completed form.
 - Checks and monetary donations
 - Reporting totals.

Extra items we can provide:

- ◆ A thermometer to track your campaign's progress - hang this in a prominent place.
- ◆ Pens, stickers, lapel buttons and other give-away items.
- ◆ Table tents
- ◆ Posters to place in lounges and hallways

If you have an idea of something you'd like to have from us, please call to see if we might have something in stock or could obtain it!



4. How to Make "the ask"

Ask and you shall receive

How do you plan to ask each individual associate to *consider* a gift to United Way? Think about how effective your "point-of-contact," moment is going to be. Will you REALLY, directly, obviously, ask each person to give to United Way? When they first see their pledge forms, how seriously will each associate consider making a gift? Will they even see a pledge form, or will their choices only be available on line? It's important to remember, you WILL need to ask them to part with some of their hard-earned cash. Find a way to approach them that is comfortable for you, and receptive to them within the environment of your particular workplace - but remember, don't assume they will give. Decide with your supervisor/CEO what the best approach and goal will be. Let them know if management is matching their dollars.



People give to people. The most effective "ask" includes a personal presentation including the human element, which is, the personal touch of a true story. This is something United Way Board Members and Agency Directors do well - tell their stories. They are enthusiastic and have great stories to tell about real people their agencies have helped - please don't hesitate to invite us to a meeting or kick-off - we're prepared! It's best not to just leave a pledge form on someone's desk and hope they "feel the need". At the least pair this with an educational piece, an e-mail, or a letter from you or upper management, explaining why their gift is needed.

Most people will respond when personally presented with a request. Face-to-face solicitations, be it from a United Way presentation or a co-worker's encouragement, is the most effective way to "make the Ask."

Make your gift first! It's hard to ask others to give, if you haven't done so yourself. Ask your CEO and other top management to make lead gifts, as well.

Did you know??

The number one reason why people don't give to United Way is because they were not asked! That's why we urge you to make sure every employee returns a completed pledge form, -- even if they decide not to give this year - to ensure that at least they were asked to give!

5. Best Campaign Practices Within Your Company

How to raise awareness & participation:

- ◆ A 10 - 15 minute presentation by United Way at an already-scheduled group meeting is the number one way to raise awareness, educate, inform, and inspire your associates. These can be coordinated through the United Way office by calling us at 231-487-1006. We can bring snacks!
- ◆ In lieu of or *in addition* to presentations, conduct an e-mail blitz throughout your campaign, highlighting the impact their United Way gifts make. Post United Way announcements and stories on bulletin boards, in employee publications and in the staff lounge.
- ◆ Show our video - at a meeting, on the company intranet, at lunchtime.
- ◆ If you are scheduling a fair or special event day, invite United Way to set up a table display. This allows co-workers to browse information without being self-conscious.
- ◆ Have a special event or "fun"d-raiser to supplement your payroll deduction pledges. It will raise awareness and build camaraderie. Hold Jeans Days or raffle off prizes.
- ◆ Provide incentives and prizes. Sometimes we all need a little "dangling carrot" to make us take action.
- ◆ Food always draws a crowd! Provide refreshments at your United Way events. Coffee, doughnuts, or fruit for morning events (okay, and soft drinks too!); pizza at lunch; cookies, brownies, ice cream or lemonade at afternoon meetings.
- ◆ Communicate the support and endorsement of your CEO/upper management.
- ◆ Establish friendly inter-department competitions, such as an office pizza or popcorn party for the department that raises the most or has the highest participation.
- ◆ Find an associate who is willing to share his/her experience (or that of a friend or family member) with a United Way program (either in receiving assistance or in volunteering).
- ◆ Utilize e-mails within your company to enhance awareness of the United Way Campaign, and to educate your co-workers about how their pledges make a difference in the community. We can help you design an email or payroll stuffer. E-mails are especially effective, but if your employees don't have computer access during the day, other options are, notices posted by time clocks and the paycheck stuffers.
- ◆ Send links to our website and campaign video.
- ◆ Include United Way pledge forms into new employee packets - employees can sign up when they start.
- ◆ Don't forget the retirees - make sure they are encouraged to continue support after they leave.
- ◆ Help us identify "Loyal Contributors" - people who have been donating to (any) United Way for 10 years or more. We want to recognize their long-term support.
- ◆ Help us collect home emails from your associates. We will use them to keep people informed about the impact of their gifts on community needs.
- ◆ Volunteer - Form a team for Day of Caring or anytime and learn firsthand about our partner agencies.



Ways to Use Incentives

- For payroll deduction gifts at a certain level
- For individual department % increase in giving
- For departments completing their campaign first
- For turning in pledge cards at presentation
- For new gifts
- For attending a department presentation or event
- For being a Leadership giver
- For department with highest participation

How to increase average gifts:

- ◆ Stress giving through payroll deduction. It's practically painless.
- ◆ Encourage first-time givers.
- ◆ Encourage donors to increase their gift by 5% or \$1 a week over last year's pledge.
- ◆ Get them to the campaign presentation. If they hear our story, they will give.

6. Setting and Achieving Goals

"Fun"d-Raisers in the Workplace

These activities are not meant to replace a payroll deduction program, but rather to add to it. They do provide a great excuse for a little fun around the office or warehouse that wouldn't be sanctioned otherwise! Employees love it when "the boss" can be included, so if yours is a good sport, see if he or she will participate in some way. One suggestion of a "Fun"d Raising Idea would be to sell Jeans Day tickets, or have a bake-off. We have so many ideas we are including a supplemental "Fun"d Raising Ideas List at the end of this booklet.

When conducting "fun"d -raisers, be ready to hand out incentive prizes. The only thing United Way asks of you is that you *don't solicit give-a-ways from other companies who may be organizing their own payroll deduction campaigns for us. Even small businesses will be solicited during the fall months.* Therefore, prizes should be donated from within your company.

Incentive prizes can include special parking, movie tickets, oil changes, t-shirts, and lottery tickets - use your imagination - start with discussing your budget with upper management. Incentives like "the Boss washes your car" or "the department with the largest participation gets lunch" are especially motivating. We can also provide a LIVE UNITED t-shirt or a mug. Estimate what you might need for food, prizes and decorations, and then see what you are able to spend (check with management) so you can tailor your "entertainment".



"Fun"d-Raisers Beware!

Sometimes campaign organizers get so caught up in planning their fun events they forget about the most important aspect of the campaign: working on making an effective "Ask", encouraging giving through payroll deduction, and collecting completed pledge forms.

Also note that often, a person will buy \$5 in raffle tickets to win an item and then NOT make a pledge via payroll deductions because they consider the \$5 to be their donation. Remember that "Fun"d Raisers should supplement the **Best Practices** (section 5) that increase participation and average payroll deduction giving.

Tip: If you see that this might be a problem, try making a completed pledge form required for "admission" to a "Fun"d Raising Event, or hold the event after the deadline for turning in forms is past.

Be Prepared

Develop a plan of action that ensures all associates are educated about what United Way does and are asked to give. The plan should include obtainable goals for your workplace to achieve.

- ◆ Understand your campaign's untapped potential. Brainstorm a plan with your campaign committee.
- ◆ Set a participation goal. To ensure that associates do not feel pressured, it is not recommended to set a participation goal above 80%. Set a dollar amount by reviewing last year's total gift and then decide on a

realistic, reasonable increase over last year's donations. A goal of 100% participation needs to keep in mind that United Way is against pressuring anyone to give who doesn't do so willingly.

United Way Opposes Coercion

Char-Em United Way believes that the most responsive contributors are those who are informed and involved. A well-planned campaign with an effective communications program that is run by committed volunteers will ensure responsible contributors. Fundraising should always be conducted in a voluntary manner, without pressure. Giving is a personal decision and coercion is unacceptable to United Way.

- ◆ Set a goal of **100% "Ask"**. *Ask* everyone! Make sure that everyone receives a pledge form. The most effective way is through distribution during a United Way presentation. If your company uses on-line pledging, make sure everyone gets a brochure and other info.
- ◆ Set a goal of **100% pledge form collection**. This ensures that everyone has at least considered a gift to United Way and made a decision. Set a deadline to collect forms and ensure that all forms are signed, even if they are not filled out with a pledge.
- ◆ Establish your campaign dates first. While the period of direct solicitation within your workplace should typically take one week, (no more than two), the campaign doesn't just "happen." Choose which of the best practices and "Fun"d Raisers you will employ and prepare for them. Schedule United Way presentations in advance, and plan the publicity efforts that will surround your campaign. If the main period of the campaign goes longer than two weeks, employees are more likely to let it go and not give at all.

7. DON'T FORGET TO SAY THANKS!

Mom always taught us to say "Please" and "Thank You" and saying "Thank You" may be the most important element in maintaining the long-term support you've worked so hard to achieve. There are so many ways to thank and recognize generous donors and the hard working volunteers within workplace campaigns.

Simple celebrations are fun, friendly ways to say thanks.

- A late afternoon reception with snacks for campaign committee. Congratulate them on their great contribution to the community.
- Award presentations for staff
- CEO congratulates employees and campaign workers at an all staff meeting
- Order free lunch for all contributors

Nothing's better than having thanks come from the boss.

- Scoop ice cream for employees at a company-sponsored ice cream social
- The boss serving homemade cookies to employees who contributed
- Boss serves breakfast or flips burgers for all participants

Other ways to say thanks:

- Send an e-mail or letter from your CEO or senior manager to every employee
- Give out thank you cards
- Include a thank you message in your company newsletter or on your intranet
- Send personal letter or card to each Leadership Giver signed by the CEO
- Announce total raised through e-mail or communication posters

Be sure to announce the total amount raised on thermometer posters, in your company newsletter, etc. And if you would like a promotional photo-shoot after the campaign is over, please let us know - we'd be honored to come to your workplace, pick up your envelope and participate in an acceptance ceremony!

We send a thank you card or letter to ALL donors - *if we get their names from the company*. **Donors of \$500 or more are recognized as members of our Leadership Circle.** They receive additional recognition and appreciation.

8. Reporting Results

Track your progress

One last step as your "Grand Finale!": the reporting process is not complete without filling in the Campaign Report. Everybody loves a winner and jumps on a bandwagon when things are going well. Track your campaign's progress and publicly report results to your co-workers as you move along. When you are finished, complete the **Report Envelope** and call our United Way office - 231-487-1006 to arrange for someone to pick up pledges and pledge forms.



So, now you've done it!! We recognize this as a huge effort on your part, and know our campaign depends on many persons like you, who put in extra time and thought to solicit these donations for us. We can't thank you enough - really, we can't -- but we can tell you how totally invaluable this is, and *you should recognize the good that will come from your work* because we certainly do. You are really the United Way Super-Heroes!

Every day we, or someone from our funded agencies, will interact with at least one person in need. Perhaps it will be someone who lost their home in a fire; a mother struggling to help a baby with birth defects learn to eat or walk; an elderly person waiting for their one meal of the day to be delivered; a run-a-way teenager and their parents who believe there is no hope; a person with an HIV diagnosis wondering how they will survive. We serve children who are removed from their homes, youth who need a safe place to go after school, children who hear their mothers being beaten, and families who go to bed hungry. If what we do - if what you do - helps one of these people each day, we have affected not just them, but every person they touch in their lives!

United Way encourages everyone to: **GIVE** (donate your time and money). **ADVOCATE** (speak out for United Way, for our agencies and for our programs). **VOLUNTEER** (give of your time - even if only to help a neighbor mow his lawn). **LIVE UNITED**. Following the mindset that we, as a community, can change the world for the better - this is what it means to LIVE UNITED.



Hey! How will *you* live your shirt?

Thank you! Thank you! Thank you!

**From the United Way Staff and
Board of Directors**

"Fun"d-Raising Ideas!

- ◆ Auctions: Ask employees to donate unique items to auction off during a lunch hour, or during other event.
- ◆ Bake Off: Who makes the best chocolate chip cookies in your office? Find out by having a bake-off and charge a "donation" for others to sample the different cookies and judge the winners. (Bake extras to sell!)
- ◆ Baby Picture Contest: See who can match the most staff with their baby pictures. Charge \$1 to enter pictures, and \$1 to make guesses - offer a prize for the most correct guesses.
- ◆ Bowling for Dollars: Recruit some teams and have a company bowling night, raising money via entry fees or per pin donations.
- ◆ Casual Dress Days: This is a big hit in any organization that has a dress code. If you already have a casual day, allow additional days (with management's permission of course!) or have a sports dress day or hat day that employees can buy into! We have special stickers "I'm dressed this way for United Way."
- ◆ More Good days: Sleep-In Days, Long Lunch Days or vacation days can also be "sold".
- ◆ Take the knots out: Bring in a massage therapist for a day and allow all those who submit a pledge form to sit down to a relaxing shoulder massage.
- ◆ Can You Top This: Serve ice cream and all the toppings at a meeting or rally.
- ◆ Pie Toss: Depending on the amount of their contributions, employees can be given a chance to toss a pie at their departmental manager.
- ◆ Air Out Those Sneakers: Celebrate Sneaker Day by having employees compete for the "most original, most beyond repair, most in need of soap and water", etc.
- ◆ Soup for the Soul: Have large pots of soup and hold a soup and bread line for your employees. On the tables leave facts regarding hunger in your community.
- ◆ Department/Office Olympics: Race on castered chairs using plungers as the only means of transportation. Race around a special obstacle course requiring employees, carrying a lunch box, to navigate their way "to work". Once at work, they put their feet on their desk and toss wadded paper into a waste-basket.
- ◆ The Price is Right: Hold a game show in the lunchroom with contestants paying to compete for prizes.



Whoops! Don't confuse fund-raiser events with the events and meetings you hold to impart United Way information to the masses. "Fun"d-raisers are for extra money, and they make the campaign special, allow a little fun, and draw attention to your program.

- ◆ Pumpkin Carving Contest: Plan a Halloween theme and hold a pumpkin carving contest. Have different categories so you can have multiple winners. Departments could carve their own and enter them.
- ◆ Raffles: Have someone donate a prize - football tickets, a weekend getaway, a car wash (please see caution above regarding solicitation of prizes from other businesses)
- ◆ Scavenger Hunt: Employees have to find unusual items around the office or the campus. You plant the items for employees to discover - or plant prizes and whoever finds them keeps them!
- ◆ Scrabble Tournament: Have a Scrabble tournament and the number of points you score equals your pledge to United Way!
- ◆ Snack Cart: Go from workspace to workspace with baked goods or candy.
- ◆ Tailgate Party: Before the big game (Foxes, Lions, etc) hold a Friday tailgate party at lunch, complete with hot dogs, chips, music, etc. Everyone should dress in sports apparel that day

Campaign Checklist:

Item	Volunteer	Comments	Done ✓
Select Dates for Campaign: Start Date _____ End Date) _____	Coordinator and Management		
Meet with Management: Ask for their assistance; Ask for their \$ contribution; Ask for a campaign budget; Ask if they will appear at the kickoff meeting; Keep them in the loop!!	Coordinator		
Calculate a \$\$ Goal Amt.	Coordinator		
Pick a theme for campaign			
Set a Meeting Date & place			
Decide your approach for obtaining pledges and return of pledge forms			
Call United Way to ask for a speaker for meeting			
Make sure you have supplies/ decorations, posters etc			
Select a "Fun"d-Raiser Event			
Obtain incentive prizes			
Write up your thank you list			
Fill out the campaign report and call United Way to pick up.	Coordinator		
Schedule a Photo Shoot	Coordinator & Mgmt.		
<p>Breathe, Breathe, Breathe! Relax - put your feet up and allow yourself a smile of satisfaction for a job well done!</p>			

Thank you for your work for Char-Em United Way!

Benefits for your company:

- * Builds employee morale and fosters a sense of team spirit
 - * Cultivates leaders through employee development opportunities
 - * Provides information on critical community issues and opportunities to be a part of the solution
- * Connects your company and employees to the community

Benefits for individuals:

- * Helps employees make informed investments
 - * Helps employees become involved with local non-profit agencies
- * Provides information on local health and human service needs

Why Partner with United Way?

To maximize impact

- * Brings together individuals, businesses, nonprofits, and agencies
- * Collaborates on targeted community solutions

To drive positive community change

- * Addresses root causes of problems, not just symptoms
- * Invests in proven solutions and supports innovative ideas
- * Measures results and reports back to you

To reach the whole community

- * Offers a centralized, community-wide fundraising approach
- * Provides cost-effective and efficient services

2011-2012 CAMPAIGN CONTACTS

United Way Staff:	Martha Lancaster, Executive Director Lisa Luebke, Administrative/Program Assistant
Board President:	Steve Andreae
Campaign Co-Chairs:	Melanie Manary, M.D., <i>Emmet County</i> Reed Freidinger, M.D., <i>Charlevoix County</i>
Division Chairs:	Peter Moss, <i>Boyne City, Education</i> Tom Mason, <i>Circuit Controls Corp., Industry & Manufacturing</i> Keith Williams, <i>Chase, Banking & Mortgage</i> Frank Lamberti, <i>Michcon, Utilities & Services</i> Suzanne Muma, <i>Bergmann Center, Agencies</i> Rob Straebel, <i>City of Charlevoix, Public Employees</i> Randi Hunter, <i>AmericInn, Hospitality</i> Joel Schraw, <i>Attorney, Professionals</i> Vicky and Dave Pendell, <i>Leadership Circle</i>