



**Greater Baytown Area  
& Chambers County**

## **Employee Campaign Coordinator Guide**

*How to Make a Difference*

*2018-2019 Workplace Campaign*

## Table of Contents

- I. Welcome
- II. Making Choices Activity : Traci Dillard, Director of Resource Development
- III. The Role of the Campaign Coordinator
- IV. Overview of United Way of Greater Baytown Area and Chambers County
  - a. Frequently Asked Questions
  - b. Upcoming Events
- V. Community Impact
  - a. Impact Grant Funding
  - b. Income, Health and Education Funding Spreadsheet
- VI. Hosting a Successful Campaign
  - a. Steps for Success
  - b. Best Practices
  - c. What should you expect from your leadership team?
    - i. *“Top Down” messaging*
  - d. Guest Presentation: Tips and Tricks for running a campaign from a fellow ECC!
    - i. *Jot down ideas and strategies that you like on your provided notes page!*
- VII. ECC Spreadsheet & Collecting Accurate Information
  - a. New spreadsheet to collect data
  - b. Helpful and efficient for your United Way
  - c. You’ve run your campaign: now what?
- VIII. Wrap Up
  - a. Campaign planning worksheet
  - b. What to turn in
  - c. Sponsorships and Awards

*Don't forget your recourses include the United Way of Greater Baytown Area and Chambers County website, Facebook page, and online toolkit!*

*[www.unitedwaygbacc.org](http://www.unitedwaygbacc.org)*

Welcome to Team United!

You are embarking on a journey that will put you in contact with a variety of people including co-workers, senior members of your workplace, representatives of local

health and human service agencies and possibly individuals who use the services provided by the agencies.

Your role will open doors to opportunities that allow you to provide key information about the services available in our community as well as how individuals can get involved to make a difference in the lives of someone less fortunate.

As a Campaign Coordinator, you are the **champion** behind the cause. Thank you for taking on this very important role. You too will see that you can make a difference in this leadership role that will continue to positively affect your workplace and your community throughout the coming year.

Your United Way team is here to support you. Part of your training as Campaign Coordinator is to encourage you to contact UW for anything you may need for campaign from materials to speakers to volunteer opportunities. All you have to do is ask! Your Resource Development Team includes Traci Dillard, Director of Resource Development, [tracid@unitedwaygbacc.org](mailto:tracid@unitedwaygbacc.org) and James Hughes, Impact and Investment Coordinator, [jamesh@unitedwaygbacc.org](mailto:jamesh@unitedwaygbacc.org) or by phone at (281) 424-5922.



*Let's have some fun,  
and let's get excited to give!*

## The Role of Campaign Coordinator

Key Responsibilities:



- Be the Leader!
- Participate in United Way Coordinator training each year.
- Get to know United Way and the work done in our community.
- Work closely with your CEO, United Way volunteers and staff members.
- Develop an effective campaign plan including dates, goals, etc.
- Recruit a team of volunteers to assist you.
- Request speakers from United Way.
- Coordinate the distribution and collection of campaign materials.
- Coordinate your company's kick-off and recognition events.
- Promote the campaign throughout your company.
- Encourage leadership giving in your campaign.
- Encourage giving of time, talent, and resources among your co-workers.
- Educate your co-workers about United Way.
- Attend United Way kick-off and celebration event. Invite your co-workers.
- Invite everyone to give. Set an example by making a gift yourself.
- Make your company campaign fun! It feels good to give – help your company remember that!
- Complete your final report and send it with pledge forms to United Way.
- Thank your donors and volunteers.
- Evaluate and make recommendations for next year.



***Make a Plan  
Work the Plan***

## Overview of Your United Way: United Way of Greater Baytown Area and Chambers County

**Who we are:** United Way of Greater Baytown Area and Chambers County (GBACC) is a volunteer-led local charitable organization with a focus on Community Impact and Advancing the Common Good. We focus on Education, Financial Stability (Income) and Health because these are building blocks of a good quality of life – and the pathway to opportunity. Changing an individual's situation can lead to improvement of their quality of life.



**Mission:** Through strategic leadership and investments, United Way GBACC will impact community improvement and inspire collaborations to address critical needs in Education, Financial Stability (Income) and Health.

**Vision:** All people of Baytown, Highlands and Chambers County will have the opportunity to realize their hopes, dreams and potential through our caring community.

United Way brings together people with passion, expertise and resources – from across the community – to get things done.

United Way is uniquely positioned to help employers create economic value – for the entire community – that also adds social value. It's called *shared value*, and it goes to the core of strong communities. Its central premise is that a company's competitiveness and the health of the communities around it are interdependent.

**Working together we will make our community  
a thriving place to live, work and play.**

## Board of Directors

<b>Directors</b>	<b>Employment</b>
Darryl Fontenot, President	Merrill Lynch
Nick Woolery, President Elect	City of Baytown
Brian Shotwell, Secretary / Treasurer	OneOK
Patti O'Neill-Burn, Past President	ExxonMobil
Becky Chalupa	Houston Methodist San Jacinto Hospital
Pete Cote'	Retired
Bethany Credeur	B Credeur, CPA
Steve Daniele	Seal Pac
Kevin Foxworth	Goose Creek CISD
Nick Graham	Chevron Phillips Chemical
Taylor Henckel	Owner, Chick Fil-A
Naomi Kathnelson	ExxonMobil
Mark Kuhlman	Covestro
Garry Nelson	Retired
Denise Pratt	Self-Employed, Law
Lola Robinson	Retired
Kaley Smith	Chambers Health
Jennifer Walsh	Covestro
Lena Yopez	Lee College

## **Staff**

**Office Number: (281) 424-5922**

Melissa Reabold	CEO / Executive Director	<a href="mailto:melissar@unitedwaygbacc.org">melissar@unitedwaygbacc.org</a>
Elisa Cherry	Finance & Office Coordinator	<a href="mailto:elisac@unitedwaygbacc.org">elisac@unitedwaygbacc.org</a>
Traci Dillard	Director of Resource Development	<a href="mailto:tracid@unitedwaygbacc.org">tracid@unitedwaygbacc.org</a>
Lori Rumfield	Director of Community Impact	<a href="mailto:lorir@unitedwaygbacc.org">lorir@unitedwaygbacc.org</a>
James Hughes	Impact & Investment Coordinator	<a href="mailto:jamesh@unitedwaygbacc.org">jamesh@unitedwaygbacc.org</a>
Lola Areago	Impact & Investment Coordinator	<a href="mailto:lola@unitedwaygbacc.org">lola@unitedwaygbacc.org</a>
Jackie Whitaker	Communications & Engagement Mgr.	<a href="mailto:jackiew@unitedwaygbacc.org">jackiew@unitedwaygbacc.org</a>
Albert Morales	Project Manager – Disaster Recovery	<a href="mailto:albertm@unitedwaygbacc.org">albertm@unitedwaygbacc.org</a>

## **Frequently Asked Questions**

### **What is United Way?**

United Way is locally owned and operated. It is a volunteer driven non-profit organization dedicated to supporting quality health and human service programs that make our community a stronger, better place for us all. United Way partners and collaborates with local agencies, organizations, civic groups and local government to find solutions that create lasting change to the highest priority problems in our service area. United Way is committed to supporting programs and initiatives that help meet basic needs and provide access to a meaningful Education, Income and good Health for every resident.

United Way GBACC is a volunteer-led local, human service charitable organization with a focus on Community Impact and Advancing the Common Good. We focus on Education, Financial Stability, and Health because these are the building blocks of a good quality of life and the pathway to opportunity. Changing situations will lead to improvement of our community's quality of life. No single non-profit alone can effectively improve our community - United Way works across the county to leverage resources, businesses, experts and other service providers to advance the common good. The essence of a prepared workforce and stable economy rests on our collective success in the areas of education, income and health.

### **Who runs United Way? Does it belong to any other company or agency?**

United Way is governed by a local Board of Directors comprised of individuals who live and/or work right here in Baytown, Highlands and Chambers County. They all serve as volunteers without any compensation. United Way is local, independent and autonomous. United Way is managed locally and not by a parent or national organization.

**What does the term "501(c)(3)" mean?**

A 501(c)(3) is a qualified non-profit agency, as recognized by the Internal Revenue Service (IRS), that has tax-exempt status. Donors may deduct contributions to United Way.

**Who serves on the Board of Directors?**

The Board of Directors is composed entirely of volunteers. Community leaders and business people - entrepreneurs, bankers, insurance and investment professionals, retirees, and employees of local government, media and academic institutions – who donate their time and resources to the United Way in the effort to build a stronger, healthier and more sustainable community.

**What is the United Way Campaign?**

United Way runs an annual workplace giving campaign in which donors make a monetary gift to the United Way of Greater Baytown Area and Chambers County to be granted to local non-profit agencies in response to the community's most urgent social needs through Community Impact grants and investments. Donors also have an option to designate a portion or all of their contribution to any human service non-profit of their choice.

**There are so many charities these days. What makes United Way different?**

United Way is a leader and catalyst for change. In our community, United Way looks for new approaches and dynamic ways to respond to problems that no single agency, donor, volunteer, nor sector of our community can do alone. United Way contributions are from community members, invested by community volunteers, and go to work within our local area. A gift to United Way Community Impact Fund will support a network of programs that address the highest priority needs in Baytown, Highlands and Chambers County.

**What are my donation options when I participate in my company's United Way Campaign?**

When you participate in your workplace giving campaign, you can choose to make a donation:

- Through a payroll deduction
- By cash or check as a one-time amount
- Using any major credit card
- Donating stocks

**How does the payroll deduction work?**

When you choose to make your United Way donation through a payroll deduction, you give permission for a set amount that you determined by completing the pledge form to be taken out of your paycheck each pay period. You will make your own decision about the amount you give based on your particular financial situation and the significance you place on supporting your community. For many people, \$3, \$5, \$10, or \$20 deducted from each paycheck is not noticed. Even the equivalent of one hour's pay per month is a generous and affordable gift and can make a significant impact in improving our community.

**What if I can't afford to give much?**

Every person's donation makes an impact, and when combined with others can add up to a life changing difference for someone in need. A little bit goes a long way for the programs supported and helps them focus on providing much needed services. If you wish to give of other resources, including your time and talents, you have many options. United Way is always looking for qualified volunteers to help with campaign and the investment process, special events, and office support, as well as for our annual Day of Caring. For volunteer opportunities, please contact us or visit our website and submit a volunteer form.

**Where does the money go once United Way receives it?**

Unless designated by the donor, money raised locally within the United Way GBACC stays in the service area to benefit this community. United Way is focused on addressing issues found in three areas: education, financial stability and health.

**How are funding decisions made?**

Each year, funding decisions are made through an extensive Community Investment process led by volunteers. Local health and human services agencies engage in a competitive grant process and submit funding requests annually that fall within our key focus areas of Education, Financial Stability and Health. After volunteer-led committees review requests and compare requests with community needs, recommendations are made to the Board of Directors. Upon approval, dollars are distributed as annual grants for specific programs within agencies that address the most pressing needs in our community.

United Way partners must meet strict standards of accountability in order to be considered for funding and are required to report quarterly on the efficiency of their programs. Donors are provided updates on these grant funded programs to show ROI including results, outcomes and impact.

### **How does United Way determine how much money agencies receive?**

United Way GBACC gives back to local agencies through Community Impact Grant Funding. Grant funding for eligible organizations' programs must focus in at least one of the following areas: Education, Financial Stability and Health. Additionally, the recipient organization(s) must work in partnership to achieve measurable, community-level changes in those areas. Grant requests are reviewed by volunteers. This meticulous process ensures that your donation is being used responsibly and efficiently to address the most urgent needs each year in the community.

### **Can I designate my gift to another nonprofit agency?**

United Way honors donor designations. If you choose to designate a pledge, please consider making an additional gift to United Way's Community Impact Fund. The Community Impact Fund provides measurable outcomes that relate directly to the three focus areas of Education, Income and Health. A gift to United Way supports a network of local health and human service programs in Baytown, Highlands and Chambers County, looking for the most effective solutions to community problems. It is important to note that if a donor chooses to designate their gift, United Way has no control over how designated funds are used by the agency.

United Way raises funds for local programs that focus on problems we all are facing. And our combined fundraising efforts allow area agencies to focus more time on their primary purpose: helping people. A gift to United Way is leveraged to its full potential to address the most pressing needs in our community and to support the most effective and efficient solutions to community problems.

### **Who benefits from my gift?**

EVERYONE. Your neighbors, co-workers, even your own family may have used United Way funded services. Emergency food, shelter and other programs are just the beginning. There are countless examples of people touched by United Way that add up to creating a healthy, vibrant, caring community that supports individuals, businesses and social and civic organizations. Last year more than 21,000 individuals were impacted by United Way gifts to the Community Impact Fund.

### **How can I make a difference?**

LIVE UNITED each and every day. Give 100%. Do something! Do anything to make a difference! A gift to the Community Impact Fund does make a targeted difference to those who need it most, but so does giving of your time and talents. There are many opportunities within our local community to get involved through volunteering, advocacy and education. Explore our website to find out more or email us at with any questions. [www.unitedwaygbacc.org](http://www.unitedwaygbacc.org)

## ***Annual United Way Events:***

Campaign Kick-Off: September 2018

Women United, Power of the Purse: October 2018

Days of Caring: October and November 2018

Starlight Gala / Volunteer Appreciation: May 2019

Stamp Out Hunger: May 2019

Annual meeting: June 2019



## Community Impact

United Way is a Community Impact organization. Our mission relates to our role in making a difference in our community. There are three focus areas for Community Impact:

**Education** - Helping children and youth achieve their potential through educational readiness

**Financial Stability (Income)** - Promoting financial stability and independence through sustainable employment and access to affordable housing

**Health** - Improving individual and family health, safety and security



### Community Impact Grant Process:

Health and human service agencies serving the greater Baytown area and Chambers County are invited to apply for Community Impact grant funds (these are defined as gifts not designated or restricted). This is a competitive grant process that includes several steps of review.

1. Agency submits a letter of intent to apply for a grant for a specific program.
2. Volunteer team reviews all applicants' financials and pertinent documentation showing compliance to IRS requirements, etc.
  - a. Any errors and missing information leads to follow up by UWGBACC to possibly clear up.
3. Volunteer team reviews grant applications within certain focus areas and goes through an objective ranking for each application.
4. Applicants make short presentation to review team for the focus area they are applying within.
5. Volunteer team goes through second objective ranking for each application. Sometimes this does not change from the first review.
6. Volunteer team meets to discuss each application and correlates all ranking to create an average rank (representing all volunteers involved in reviewing that particular grant).
7. Volunteer team makes funding recommendation (using the objective ranking and amount of monies available to each focus area).
8. Recommendation made to UWGBACC' Board of Directors who either approves the funding per the recommendation or may request further review.
9. Grant awards announced. All recipient agencies then provide:
  - a. Quarterly report showing Results Outcomes and Impacts (ROI)
  - b. Final report giving one year results of funded program
- I. UWGBACC uses these reports to share how gifts were invested in our community, thus, keeping donors informed throughout the year.

## Hosting a Successful Campaign Steps to Success

- a. Best Practices
- b. Guest Presentation: Tips & Tricks



### Steps for a Successful Campaign

1. Involve top management.....  
*Active support from your CEO tells employees that your campaign is important to your organization.*
  - CEO signs letter recruiting campaigners.
  - CEO signs letter to all employees urging their support through payroll deduction and attendance at meetings.
  - CEO speaks at employee meetings about his/her commitment to United Way's vital role in the community.
2. Form an employee campaign committee.....
  - Recruit Committee volunteers from key areas of the company and those who have a great deal of enthusiasm and energy.
  - Consider incorporating volunteers whose responsibilities are shared across business lines: Marketing/Communications, Information and Technology, Payroll, Human Resources, Labor, Training, Retirees, etc.
  - Establish job descriptions for committee members, including Leadership Giving, Special Events, Training, Marketing, Communications, Pledge Processing, Retirees, New Hires, etc.
  - Schedule training for Committee with your UW liaison.
3. Make pre-campaign arrangements.....
  - Establish dates for campaign, plan Kick-Off meeting.
  - Recruit Campaigners, schedule training with your UW liaison.
  - Develop plan for record keeping and reporting.
  - Arrange for payroll deduction procedure.
  - Have pledge cards personalized if possible.
  - Develop publicity plan and incentives.
  - Attempt to keep campaign as short as possible, one to two weeks. This will help keep enthusiasm high and momentum strong.
  - Determine solicitation methods, group, individual or both.
  - Establish goals for company. Consider a goal of 100% solicitation to ensure every employee is educated about United Way and is asked to give.
4. Plan separate senior team campaign.....  
*It is crucial to have management support before soliciting your peers.*
  - Hold presentation about United Way, which includes remarks by CEO, Campaign Coordinator, and United Way liaison.
  - Offer a tour of a United Way funded program.
  - Invite their leadership giving gift (\$1000+).

5. Publicize.....

*Help motivate and educate people as well as increase employee participation.*

- Develop campaign and year-round publicity.
- Build campaign around central theme; tie in your company slogan or logo.
- Announce incentives - vacation days, assigned parking spaces, prizes.
- Place road signs along driveways, use flags, banners, goal charts, posters.
- Submit articles to your company newsletter (volunteers, projects, personal experiences, campaign updates.)
- Use e-mail or company social media / intranet to promote the campaign.
- Send candid (or staged) campaign pictures to your RD team. We can post to our Facebook page as well as being used to promote your successes in upcoming campaign newsletters



## Best Practices

- 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 United Way. We can do multiple presentations during any shift at any area workplace.
- Have a special event or “fun”-raiser to supplement your payroll deduction pledges, raise awareness, and build camaraderie.
- Provide incentives and prizes. Sometimes, we all need a little carrot to make us take action.
- Food always draws a crowd. Provide refreshments at your United Way meetings. Coffee, doughnuts, or fruit for morning events; pizza at lunch; cookies, brownies or fruit, at afternoon meetings.
- Communicate the support and endorsement of CEO/upper management.
- Establish friendly inter-department competitions, such as an office pizza party for the department that raises the most or has highest participation.
- Have a pot-luck luncheon, or casual dress days to benefit United Way.
- Find an associate who has been personally affected by a United Way program (either in receiving assistance or in volunteering) that is willing to share his/her experience. Personal testimonials, especially from peers, go a LONG way.
- Incorporate United Way pledge forms into your new employee orientation packet and allow new hires to complete a pledge form when they sign on.
  - And don't forget to ask those retiring from the company if they will continue to participate.
- 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 staff lounge.
- Stress giving via payroll deduction.
- Encourage donors to increase their gift by 10% or \$1 a week over last year's pledge.
- Structure incentives so that they are based on giving levels.
- Make a completed pledge form required for “admission” to your “Fun”-raising event.



**Guest Presentation: Best Practices Notes Page**

# DON'T FORGET

Don't forget about the most important aspect of the campaign: raising money for critical community needs. Keep your co-workers informed so they get involved and give a gift – then be sure they return their pledge form to you.

**Word of caution:** sometimes your co-workers will buy jeans Friday stickers and then NOT make a pledge via payroll deduction because they consider that to be their donation. Remember that special activities should supplement the campaign by increasing awareness and involvement, but will not replace the gift.



## Sample of a 15-Minute Meeting Agenda

- |           |   |
|-----------|---|
| 2 minutes | Welcome and Message from Leadership <i>CEO or member of senior team</i>   |
| 5 minutes | Message from your <i>United Way Representative</i>  |
| 5 minutes | Message from <i>Grant Funded Agency</i>   |
| 3 minutes | Message from <i>Campaign Coordinator</i> to include campaign specifics, address any questions and to thank the group for attending the presentation |

## Tips:

### Don't fly solo

- Participation of your senior team is essential for a successful campaign. We already have their support or we wouldn't be conducting a campaign. Ask them to personally endorse it with a personal letter or speech to staff members. Ask them to approve incentives to be used for the campaign.
- Don't feel like you have to "go it alone." Find a friend at work that is willing and able to help you co-chair your campaign efforts. If your workplace has multiple departments or locations spread around town (like a school district), consider recruiting helpers from each department to serve on a committee. Find people who are well-liked and respected by co-workers.

### Give everyone an opportunity to participate

- How do you plan to ask each individual associate to give to United Way? Think about how effective your "point-of-contact," moment is going to be? Will you REALLY, blatantly, obviously, be asking each person to give to United Way? How seriously will each associate consider making a gift when they first see their pledge form? Will they even see the pledge form? People give to people. The most effective "asks" include an educational piece along with the human element, the personal touch of a story, a presentation, an e-mail, or a letter from you or upper management, explaining why their gift is needed. It's best not to just leave a pledge form on someone's desk or stuffed in their paycheck.
- The number one reason why people do not give to United Way is because they were not asked! That's why we are asking YOU to make sure EVERY

person at your workplace returns a completed pledge form, even if they're not giving this year—to ensure that we did OUR job of asking them.

*Campaign tools to help you communicate and report:*

- **Brochures** It's important to make sure that everyone in the workplace is given an informational brochure and pledge form so they can make an educated decision about giving.
- **Pledge forms** Be sure donors are completing the form correctly and using home address. One copy goes to your payroll department, one is returned to United Way and one stays with the donor.
- **Reporting envelope** Please return all completed pledge forms, checks, and monetary donations in this envelope. FILL OUT THE FORM – this helps you audit your totals.
- A **budget** Depending on your workplace, you may have some money to use for incentives, prizes, and events.
- **Posters** Great to post in communal areas to remind co-workers that your company supports United Way and provides an easy way for each person to participate.

**United Way Opposes Coercion-**

*United Way of Greater Baytown Area and Chambers County believes individuals should be given the opportunity to learn about the work of United Way, the needs of the community and the resources available; the person who is informed and involved is more likely to contribute. A well-planned campaign with effective communications program that is run by committed volunteers will increase participation and donations. Fundraising should always be conducted in a voluntary manner, without pressure. It should be fun. Giving is a personal decision and coercion is not the practice of the United Way.*

## Campaign Planning

1. GET INFORMED. Name one new thing you've recently learned about United Way.
2. GET HELP. List the names of people, including any from the leadership team that you'll recruit to help with your campaign.
3. HOW ARE YOU GOING TO MAKE THE ASK? Explain how co-workers will be given their pledge forms and how they'll be asked to turn them in.
4. Which BEST PRACTICES do you plan to use in your campaign?
5. SETTING AND ACHIEVING GOALS Tentative campaign dates (Depending on the size of your company, the main pledge form solicitation period should last no longer than two to three weeks.)  
  
Start: \_\_\_\_/\_\_\_\_/ End: \_\_\_\_/\_\_\_\_/
6. DON'T FORGET TO SAY THANKS. Explain how you will help us thank those who make a gift.
7. REPORT RESULTS. Use your United Way reporting envelope to audit pledge forms and monies before submitting. Return envelope with pledge forms and any one-time gifts before March 30, 2019 to be sure all gifts are received by the end of the campaign year.