EMPLOYEE CAMPAIGN LEADER HANDBOOK

Rebuilding Tucson & Southern Arizona, the United Way.

United Way of Tucson and Southern Arizona
We cannot thank you enough for your commitment to building a thriving community by serving as an Employee Campaign Leader (ECL). This handbook is your first step to leading a successful United Way campaign.

Get familiar with the work of United Way of Tucson and Southern Arizona (UWTSA), and then move to the Building Blocks to find ideas, suggestions and best practices for running a United Way campaign. Keep in mind that your UWTSA representative is ready to assist you at any time. You can find their contact information below.

Contact your United Way Representative:

Carlton Miller, Development Officer cmiller@unitedwaytucson.org, 520-903-3901
Susan Koza, Senior Development Officer | skoza@unitedwaytucson.org, 520-903-3972

Go to www.unitedwaytucson.org/corporate-partners for downloadable campaign tools such as posters, brochures and flyers.
ABOUT UNITED WAY OF TUCSON AND SOUTHERN ARIZONA

WE ARE

Uniting for an educated, healthy and thriving community.

From birth to career, career to retirement and retirement to end of life, United Way supports the well-being and success of every person in Southern Arizona.

MISSION

Building a thriving community by uniting people, ideas and resources.

VISION

A community where every child receives a high-quality education from birth to career; every adult has the opportunity to thrive financially and in the workplace and every older person can retire and age with dignity and independence.

United Way of Tucson and Southern Arizona responds to our community's needs, transforms individual lives and brings long-lasting, systemic change to our community by focusing on the key, underlying issues. We fight for education, financial wellness, equality and healthy communities for every person in Tucson and Southern Arizona from birth to end of life. Our role as community convener enables us to form strategic partnerships, mobilize the best resources and be the catalyst for needed, positive change.

IMPACT AREAS:

EDUCATION – BIRTH to CAREER
Improve educational and life outcomes for children, youth and young adults by advancing equity and excellence in education.

FINANCIAL WELLNESS – CAREER to RETIREMENT
Improve the equity of employment and financial wellness outcomes of adults and families for life-long well-being.

HEALTHY COMMUNITIES – RETIREMENT to END OF LIFE
Provide equitable access through education and resources to improve the quality of living and dying for older people and their families.

COMMUNITY IMPACT

Now more than ever our community's big challenges call for big solutions. United Way of Tucson is uniquely positioned to react to crisis and be nimble in the face of adversity. Through our programming, partnerships, and grant funding we turn every $1 invested into a $5 impact.

To truly make a difference in these uncertain times we must pool our resources. United Way's Local Community Impact Fund supports more than 180,000 residents of Tucson and Southern Arizona from Birth to End-of-Life. Our nearly 100 years in Tucson has shown us that when we are united, we can achieve more than any single entity can alone. GIVE BIG. GIVE UNITED.
WHERE DOES MY COLLECTIVE IMPACT INVESTMENT GO?

COMMUNITY IMPACT FUND

VISON
A community where every child receives a high-quality education from cradle to career, every adult has the opportunity to thrive financially and in the workplace and every older person can retire and age with dignity and independence.

Q. WHAT DOES COMMUNITY IMPACT MEAN?
A. Community Impact occurs when organizations from different sectors agree to unite together to solve complex problems using a structured form of collaboration. United Way provides the space and structure to support these efforts and dedicated staff to guide the vision and strategic development to work toward large-scale social change. United Way’s efforts help to align activities and establish shared measurement practices to build best practices, leading to the most community-aligned and robust programs and services.

Q. HOW DOES UNITED WAY TURN $1 INTO A $5 IMPACT?
A. Every $1 goes further because of the collective approach and strategic networks United Way has in place. Investments are amplified locally by collaborating with nonprofit partners, utilizing volunteers and by applying for federal and national grants that bring new dollars into Southern Arizona to help build a thriving community.

Q. HOW AND WHERE WILL MY INVESTMENT BE USED?
A. Investments made to the Community Impact Fund directly support local work to improve education, financial wellness and healthy communities. Funds go to direct services such as the VITA program, partner organization allocations, collaborative partnerships like Cradle to Career and programing efforts such as the ELDER Alliance. Needs are identified through engagement with our community coalitions and funding decisions and accountability are guided by a board-approved strategic plan. Every funded initiative provides quantifiable results and are held to a comprehensive list of standards.

YOUR CONTRIBUTION

$1

$5

COMMUNITY IMPACT FUND
EVERY $1 INVESTED IN UNITED WAY’S COMMUNITY IMPACT FUND LEVERAGES A $5 IMPACT

YOUR INVESTMENTS HELP US FIGHT FOR:

EDUCATION
Improve educational and life outcomes for children, youth and young adults by advancing equity and excellence in education.

FINANCIAL WELLNESS
Improve employment and financial security outcomes of adults for life-long well-being.

HEALTHY COMMUNITIES
Improve quality of living and dying for older people.

SUPPORTING 180,722 LIVES ANNUALLY IN TUCSON AND SOUTHERN ARIZONA
UNITED FOR SOUTHERN ARIZONA
COVID-19 RELIEF FUND

An unprecedented crisis requires an urgent and fluid response. This past year has been marked by COVID-19 and the subsequent financial crisis. Your United Way of Tucson was the first nonprofit organization in the region to set up a fund to help community members respond, recover and rebuild in the wake of a global pandemic. We quickly made connections with our nonprofit partners, local foundations, businesses, media and educational organizations to create and manage the United for Southern Arizona COVID-19 Fund.

Funds raised have been distributed to partner agencies and go directly to helping local individuals and families with essential needs items including: food and baby formula, diapers and essential health supplies, rental assistance, utility assistance, child care, and other critical services and resources to stabilize families. This past year, we were able to serve 76,110 individuals and families with emergency support. Our efforts continue in 2021 as we work to help our community emerge stronger than ever.

| Funding sent to 35 partner agencies to fulfill 1,599 critical needs requests. |
| $1,350,214 raised |
| 76,110 INDIVIDUALS AND FAMILIES SERVED. |
| $529 average support given by household |
| $22,474 worth of diapers & health supplies distributed |

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UNITED FOR EQUALITY

United Way of Tucson and Southern Arizona has been working to create a more equitable society for nearly 100 years by transforming individual lives and bringing long-lasting systemic change to our community by focusing on the key, underlying issues.

United Way believes that every person is entitled to be treated with dignity and respect, including equal treatment and access to justice. The policies and practices of institutional racism that continue to impact people of color directly and indirectly in our community by limiting access to health care, housing, education, and employment must come to an end. We must do our part, working United, to make this community equitable, respectful, and opportunity-filled for all.

SONIA’S STORY

Sonia is a 33-year-old mother of two, Ikuzo and Michael, and helps support Savannah, her step daughter, with her husband Jeffery Schmitz. Sonia moved from Rwanda to Tucson four years ago and is currently enrolled in the LPN course at Pima Community College. When she first moved to America with her husband they found out they would be expecting a child and Sonia was worried about not having family there for her first pregnancy. Looking for community support, Sonia and her husband became involved with Healthy Families, a program supported by United Way of Tucson which provides free in-home assistance and education on parenting techniques. “I was a new Mom and had no family to help, Healthy Families came to our apartment and gave me information on what to expect for every trimester and techniques to help raise and play with the kids. I’m so grateful to United Way and the help they continue to provide for my entire family.” - Sonia Schmitz
United Way improves educational and life outcomes for children, youth and young adults from Birth to Career by advancing equity and excellence in education.

Without United Way of Tucson’s support this year, our school would have closed due to COVID-19 financial hardships. Your support is educating children, improving families and giving kids from vulnerable populations a chance.

- Kelly Stolz & Dr. Ernestina Fuentes, Guadalupana Lab School

Current totals as of August 2021

171,443 books given to children to build their personal libraries

826 families received guidance for raising and nurturing their child at home

735 opportunity youth connected back to education & career pathways through re-engagement services

1,601 adults attended classes to become better parents

631 individuals learned new early childhood education & family support building skills
FINANCIAL WELLNESS

Improve the equity of employment and financial wellness outcomes of adults and families for life-long well-being.

“ When we give back to Tucson as a whole, we in turn make this city a better place to live for ourselves and our children. Now that I am in a position where I’m able to help, I feel it’s my duty to give back to help those who may have been born into poverty or have had hardships to overcome.

- Eric Bohorquez, AGM Container Controls & Top ECL of 2020-2021

14,180
low-income working families

INCLUDING
$11.3 MILLION
in earned income tax credit

IN ARIZONA RECEIVED FREE TAX PREP

$26 MILLION
in federal refunds returned

TO LOW-INCOME ARIZONA RESIDENTS

46 HOMELESS VETERANS
provided with support and resources

7,744 LOW-INCOME HOUSEHOLDS
received free tax preparation services in Pima County

Current totals as of August 2021
HEALTHY COMMUNITIES

Provide equitable access through education and resources to improve the quality of living and dying for older people and their families.

Not only does United Way support needed social service programs, but also hosts important community organizing activities. Volunteering and donating to the ELDER Alliance has given me the insight, support and confidence to advocate for the diversity and inclusion of all voices in Southern Arizona.

- Lavina Tomer, ELDER Alliance Supporter

11,103

SENIORS SERVED THROUGH PROGRAMS

3,005

SENIORS

GIVEN TOOLS TO PLAN FOR END OF LIFE THROUGH WORKSHOPS AND COACHING SESSIONS

14,147

SENIORS

REMAIN AT HOME WITH SUPPORTIVE SERVICES

4,202

ACTIVE SENIOR VOLUNTEERS

11,103

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ACTIVE SENIOR VOLUNTEERS

Current totals as of August 2021

HOW TO RUN A SUCCESSFUL UNITED WAY CAMPAIGN

Primary Objective
To mobilize and energize your co-workers to create a stronger community by planning, organizing and coordinating a successful United Way Campaign within your company. On behalf of the people who will be helped this year, thank you for all your hard work. It takes people like you, who go above and beyond, to make this campaign successful.
10 Steps to a Successful United Way Campaign

1. EDUCATE YOURSELF ABOUT UNITED WAY
The more you know about United Way and running a campaign, the more successful you will be promoting your campaign, communicating the mission of United Way, and leading your team. Your United Way representative is always available to answer questions and help you feel comfortable talking about United Way.

2. SECURE EXECUTIVE OR TOP-LEVEL SUPPORT
The success of your campaign depends on the commitment and involvement of your executive officer, their endorsement of your campaign and scheduling a special presentation to leadership. Please schedule a separate leadership presentation.

3. RECRUIT AND TRAIN YOUR CAMPAIGN COMMITTEE
With your executive's support, select a team to help plan and run the campaign. The number of volunteers you recruit will vary based on the size of your organization. Choose United Way advocates, those employees who have given to the United Way or volunteered with United Way.

4. DEVELOP A CAMPAIGN PLAN
With the campaign committee, begin to lay out the campaign plan, and logistics, and share the tasks so everyone is contributing to your campaign event and the workload is evenly distributed.

5. PROMOTE AND PUBLICIZE YOUR CAMPAIGN
You and your committee can be creative in generating publicity and creating excitement and interest. You know your environment the best and what will be most effective for your culture.

6. LEADERSHIP GIVING
Ask your CEO to appoint an executive who will lead the Leadership Giving Campaign and encourage the management team to participate.

7. KICK OFF THE CAMPAIGN
A kickoff event is a very successful way to communicate a consistent message to your employees about the needs in the community and services United Way helps to provide.

8. VOLUNTEER
Participate and encourage others to join in Days of Caring and see the impact your commitment to the community makes. Sign up and find out more at: Unitedwaytucson.org/daysofcaring.

9. MAKE THE ASK
Do you know why most people don't give to United Way? Because they were never asked. Most people are generous and want to give, so schedule United Way presentations and remind them that a gift TO United Way is the most impactful gift.

10. WRAP UP THE CAMPAIGN
Totaling the results and completing the report envelopes (if applicable) is the final stage. Ask your United Way staff any questions you have about finalizing your report. It is important to update your employees all year about how their dollars are helping in the community. Keeping employees engaged through volunteer opportunities gives them a sense of ownership in the community and builds morale.

SAY THANK YOU!

BONUS: GO GREEN & STAY GREEN!
Opt to use our online Workplace Giving Platform to create a successful campaign!
"Fun-Raisers" can be used to raise awareness of the campaign and can be held as kick-off or wrap-up events. If your “Fun-Raiser” is intended to solicit contributions, make sure to hold the event after your payroll pledge drive.

- Jeans Day – “sell” jeans day coupons for a certain dollar amount
- Bake Sale/Basket Sale/Craft Sale
- Balloon Gram – For $1 send a balloon to fellow employees
- Ice Cream Social
- Managers Serve Breakfast/Lunch
- Midnight Breakfast – great for 3rd shift
- Book Sale – Sell donated books
- Car Wash – Senior Management washes cars
- Lunch Box Auction
- Dunk Tank
- Golf Tournament
- Raffle for Donated Items
- Silent Auction

**FUN CAMPAIGN THEMES**

Themes help create excitement and energy for the campaign and are used to help drive results.

- I Heart Tucson
- LIVE UNITED
- Super Heroes
- Favorite TV Show
- Healthy, Happy, Happening
- Carnival Theme
- Car/Race Theme: Driving Results
- Beach/Vacation
- Game Show
- Hollywood/Awards Show
- Power of Giving
- Sports/Olympics
- Travel/Around the World
- Wild, Wild West
- Fiesta
INCENTIVES

Many organizations provide incentives tied to their campaign goals. A large budget is not necessary for incentives - there are many free incentives you can offer to employees for participating in the campaign. These items can also be donated and used in silent auctions.

- Angel Day (Personal Day Off)
  - Can be done incrementally for additional days off
  - Example: One hour pay personal giving = 8 hours Paid Time Off
- Sleep-In/Long Lunch Pass
- Jeans/Casual Day Passes
- Covered/Priority Parking
- Sports/Show/Movie Tickets
- Company Swag/Gear
- Pizza Party
- Weekend at Vacation Home
- Lunch with CEO
- Raffles (for each person who pledges or gives by a certain date)

COMPETITIONS

Who doesn't love a little competition? Whether you have a participation, giving or a skill contest, competitions between different teams or departments can make it a fun and easy way for employees to participate.

- Participation/Goal Challenge
- Talent Show
- Golf/Putting Contest
- Office Olympics
- Door/Cube Decorating Contest
- Team/Department Challenge
- Pumpkin Carving Contest
- Trivia Challenge
- Push-Up Contest
- Jump Rope/Hula Hoop Contest
- Chili Cook-Off/Salsa Competition
- CornHole Competition
GO SOCIAL!

Tips:
1. Posting is a great way to share your company's volunteering/donation success.
2. Make sure to pair your post with an engaging and high quality image.
3. Make sure to thank employee volunteers and donors for their efforts.
4. Tag United Way Tucson in your post along with other relevant participants.
5. Strategize the best time to post and keep posting to keep excitement high.
6. Include hashtags: #LiveUnited #UnitedWeAllWin

Example Post:
We’re thrilled to announce we’ve raised more than [dollar amount] so far in our @UnitedWayTucson campaign! Huge thank you to all of our supporters so far. Don’t forget, we only have 1 week left, have you made your pledge yet? Visit www.UnitedWayTucson.org to make your pledge today! #LiveUnited #UnitedWeAllWin

GET MORE INVOLVED

Days of Caring
Participate in the biggest Volunteer Event in Southern Arizona! Join thousands of volunteers as we pair local needs with caring residents to improve the community. www.UnitedWayTucson.org/Days-of-Caring

Encouragement Cards
Write cards to encourage kids and promote a love of reading.

MY SUMMER LIBRARY
Help children pick out 12 self selected books for their home libraries to promote summer reading and mitigate summer learning loss.

VITA
Help individuals and families prepare their taxes and help vulnerable community members receive the biggest check many will receive all year: their tax refund. * no previous tax experience required, training provided!


RESOURCES & REFERENCES

United Way of Tucson Website:
UnitedWayTucson.org

Workplace Campaign Online Resources:
UnitedWayTucson.org/workplace-campaigns/

Days of Caring:
UnitedWayTucson.org/Days-of-Caring

Volunteer:
UnitedWayTucson.org/Volunteer

End of Life Care Partnership:
AZEndofLifeCare.org/

Cradle to Career:
www.c2cPima.org/
Giving to United Way of Tucson’s Community Impact Fund is the easiest and most powerful way to improve your community.

Leadership Givers and Affinity Group members bring tremendous resources to our local community and create a powerful impact that changes lives.

Leadership Giving
- $500 minimum donation
- $500 suggested donation
- Women United $1,000 minimum donation
- Tocqueville Society $10,000 minimum donation

To learn more and view member benefits visit unitedwaytucson.org/get-involved

My United Way Staff Contact is:

My Campaign Starts: __________
My Campaign Ends: __________

### Campaign Checklist

**Action Items**

#### Before Campaign

- Meet with United Way staff and determine needed supplies and discuss possible awareness activities and solicitation methods.
- Meet with your CEO to obtain commitment to endorse campaign.
- Recruit committee and develop a campaign schedule.
- Establish campaign goal and dates.
- Plan group solicitation meetings.
- Order pledge forms, brochures and other materials for delivery or confirm online campaign will be ready and available for solicitation during kickoff.
- Contact United Way to schedule speaker(s) for group meetings, schedule agency tours and arrange United Way Days of Action.
- Send out CEO endorsement letter supporting United Way and organized labor letter supporting United Way, if applicable.
- Run Leadership Campaign.

#### During Campaign

- Hold group meetings and events.
- Keep progress report to monitor campaign, including number of givers and pledges received and forms outstanding.
- Post progress of the campaign.
- Follow up with employees who missed meetings because of vacations, etc.

#### After Campaign

- Collect any unreturned pledge forms.
- Recognize and thank your donors and campaign committee.
- Document what you did to share with next year’s ECL.
- Turn in your pledges and money to United Way staff.
- Thank your Team.
- Celebrate your campaign success!

## Campaign Calendar

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<tr>
<th>Month of:</th>
<th>Use this blank calendar to help you map out your campaign timeline.</th>
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UNITING FOR AN EDUCATED, HEALTHY AND THRIVING COMMUNITY

UNITED WAY OF TUCSON AND SOUTHERN ARIZONA

EMPLOYEE CAMPAIGN LEADER

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