



**UNITED WE FIGHT.
UNITED WE WIN.**

LIVE UNITED

**Head of the Lakes United Way
Employee Campaign Coordinator
ECC Guidebook
2017-18**

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INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.1 Head of the Lakes United Way – Overview, Mission & Vision

OUR MISSION & VISION

HLUW's mission is to unite caring people and mobilize resources to empower individuals and strengthen communities. We strive to be the recognized leader in engaging and equipping our communities to eliminate the greatest challenges we face.

What We Do

To make a significant impact, we do the following:

- Efficiently raise and allocate funds to support strong programs at member nonprofit organizations that provide needed services throughout the region.
- Offer individuals and local businesses an easy and meaningful way to support those causes of greatest interest through workplace campaigns and other giving opportunities.
- Convene community leaders and volunteers to identify and address critical, unmet needs through focused grants, collaborations and other initiatives that impact the community.

Our Programs and Initiatives

United Way 2-1-1: United Way 2-1-1 provides information on and referrals to community, health, and social services. A 24-hour, state-wide service, you can reach United Way 2-1-1 by calling 2-1-1 or 800-543-7709. The Duluth "hub" serves residents in 39 counties in Minnesota as well as Douglas County in NW Wisconsin.

United Way Community Giving Campaign: Each year, more than 500 local workplaces and thousands of individual donors participate in United Way's Community Giving Campaign. This campaign supports local health and human service programs that create real, lasting change for individuals and families in our region. Participating in this program helps businesses raise their public profile while assuring our partner agencies can focus on their clients. For more information contact Michelle Hargrave at 218-726-4771.

United Way Community Services: The AFL-CIO Community Services Program works with union members in a variety of ways. It assists union members in need. As a liaison, UWCS informs labor groups and change makers about the obstacles those in poverty face when trying to find employment. It also mobilizes the caring power of working union members to get them actively involved and participating in the United Way campaign and volunteerism. For more information contact Rachel Loeffler-Kemp at 218-726-4775.

United Way Volunteer Center: United Way's Volunteer Center connects workplaces and individuals with volunteer opportunities at over 60 local non-profit agencies. Volunteering is a hands-on way to see the impact local agencies are creating in our community and to help advance this work. Through the Volunteer Center's services and events, such as Day of Caring, agencies are provided with valuable skills and resources from community members. For more information contact Liz Pawlik at 218-726-4889.

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INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.2 Contacts – Staff and 2017-18 Board

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INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

2017 Head of the Lakes United Way Board of Directors

OFFICERS:

Lisa Erwin PhD, Chair

University of Minnesota - Duluth

Cindy Theien, Vice-Chair

National Bank of Commerce

Eric Siljendahl, Secretary

US Bank

Deanna Benson, Treasurer

Republic Bank

Louise Anderson

Carlton-Cook-Lake-St. Louis County
Community Health Board

Cassandra Beardsley

St. Luke's Health Care System

Mark Britton

UnitedHealthcare

Jason Davis

North Central States Regional Council of
Carpenters

Anna Downs

Eisenmann & Associates

Brent Fennessey

Otis-Magie Insurance Agency

Denise Hamsher

DMH Strategies, L.L.C.

Kalee Hermanson

Holden Insurance Agency

Tricia Hobbs

Thrivent Financial

Phil Jents

City of Duluth

Steve Jorgensen

Essentia Health

Kathryn Koch

ALLETE, Inc.

Annie Lepper

MPECU

Beth McCuskey

Central Labor Body

Steve Morris

ALLETE, Inc.

Lisa Neitzel

Surge Communications

Jen Patterson

maurices

Mary Anderson-Petroske

Superior High School

Barbara Reyelts

Northland's NewsCenter - Retired

Neal Ronquist

Duluth News Tribune

Mark Sitek

Enbridge Energy - Retired

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INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.4 HLUW Programs: AFL-CIO Community Services



OVER 70 YEARS AGO, on August 17, 1942, an agreement on cooperation was signed by the National Congress of Industrial Organizations (CIO) Committee for American and Allied War Relief, the United Nations Relief Committee of the American Federation of Labor (AFL) and the Community Chests and Councils, Inc. (now United Way Worldwide). This agreement encouraged labor representation on Community Chests boards and councils, and for recognition of union members' contributions. The agreement sought cooperation between employee solicitation organized by employers and union representatives who jointly stressed voluntary contributions without coercion.

This agreement came in response to the growing number of fund drives organized to support Community Chests, labor war relief, American Red Cross, the USO, war bond campaigns, plus a number of trade, religious and advocacy groups who wanted to help. To coordinate effective support, organized labor and the Community Chests and Councils, Inc. agreed to join in collaborative fund raising and community development. As a result, labor liaison positions were established on the staffs of local community chests.

In 1946, the Department of Labor Participation was established at United Way Worldwide. The aim was to join United Way, labor and health and welfare agencies in a cooperative, community effort to bring services and people together. To accomplish this, what are currently known as AFL-CIO Community Services liaisons are employed by United Way organizations throughout the country. These representatives are selected by the local AFL-CIO Central Labor Council and serve at the pleasure of United Way and the Council.

Organized labor is a full partner in United Way, as witnessed by the 156 AFL-CIO Community Services liaisons currently serving on the staff of state and local United Ways throughout the country and the 20 Labor Agencies that receive United Way funding. Representatives of unions volunteer in all phases of United Way activities, serve on year-round committees, participate in annual United Way campaigns as part of the campaign leadership structure, and communicate to union members the importance of the campaign and the agencies involved. Union members are involved as volunteers in their communities by working with the many health and human care agencies providing services to the community.

On November 22, 1971 and again on April 4, 1979, the Cooperative Memorandum of Understanding between the United Way Worldwide and the AFL-CIO was reaffirmed.

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INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.5 HLUW Programs: Volunteer Center

The Head of the Lakes Volunteer Center's mission is to build a vibrant community by connecting people with meaningful opportunities to serve. We do this by providing easy access to a wide range of volunteer opportunities throughout the Twin Ports.

We Help Connect Volunteers with Agencies

The Volunteer Center helps promote agencies volunteer opportunities and recruit new volunteers through various efforts including use of our comprehensive web site, personal consultations and referrals, e-newsletter and community events.

www.volunteerduluth.org and www.volunteersuperior.org

Our website is your one-stop shop for volunteer opportunities in the Twin Ports area! It features over one hundred opportunities from over 60 agencies. We link people who want to give back to the community with organizations who need them. The user-friendly searchable database makes it easy to find volunteer opportunities that are just right for the individual. Search for what interests you by agency name, interest area, date, and more!

Weekly Service Scoop

Your e-connection to one-time and short-term volunteer opportunities happening all over the Twin Ports! Stay up to date with current opportunities by signing up for this weekly e-newsletter. You can sign up by visiting volunteerduluth.org or volunteersuperior.org.

United Way Day of Caring- June and December

The Volunteer Center organizes our local Day of Caring. Over 400 volunteers from area companies and organizations come out to make a difference by volunteering to serve at local non-profits agencies to tackle one-time projects. More than 40 projects and donation drives are completed through this awesome event!

National Volunteer Week- April

We celebrate our community volunteers by organizing a local National Volunteer Week recognition campaign in April. Volunteers wearing purple "I Volunteer" ribbons during National Volunteer Week will be acknowledged by receiving special deals and discounts at participating businesses.

INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.6 Head of the Lakes United Way Impact Areas

| COMMUNITY-WIDE GOALS & OUTCOMES | |
|--|--|
| EDUCATION Fostering Successful Children and Youth | INCOME Promoting Financial Stability and Independence |
| <p>Outcome: Early Childhood Education: <u>Outcome: Increase early learners' ability to succeed in school and read well by grade 3.</u> United Way is seeking proposals from programs able to demonstrate a high level of impact in preparing children to enter kindergarten and succeed academically by grade 3. National, state and local data suggest that many children enter school without the necessary proficiency and skills appropriate for their age level. Communities that nurture children by providing parent/caregiver supports and have access to quality early childhood care and education will raise children who possess the commonly recognized school-ready skills, allowing them to start out with the greatest predictor of educational success.</p> <p>Outcome: Youth Achievement: <u>Outcome: Increase youth access to and engagement in high-quality programming which promotes academic achievement.</u> United Way is seeking proposals from programs able to demonstrate a high level of impact in providing youth in grades K-12 with the necessary academic, social, and personal skills to succeed in school. Children who are able to read at grade level have the essential tools needed to excel in grade school, setting the stage for success in middle and high school. High school graduation is fundamental for advancement to higher education and to gain employment.</p> | <p>Outcome: Increase income: <u>Financial stability can be achieved through a continuum of services available to increase income and reduce debt, beginning with improved money management and increased credit ratings, tax preparation assistance to claim tax credits, and providing better access to education and workforce opportunities to enhance job skills.</u> Accessing the Earned Income Tax Credit is a proven step toward increasing income and reducing poverty. The cost of living in this region continues to outpace wage growth resulting in an increased number of employed people living in poverty without adequate income to make ends meet. Achieving financial stability allows people to move out of poverty and toward independence.</p> <p>Outcome: Gain and sustain savings and assets: <u>In addition to increasing income, building savings and assets is vital for the financial stability of lower-income people.</u> The ability to develop a savings reserve ample to weather a typical emergency without the need to take out a payday loan is essential to maintaining financial stability. Developing a banking relationship by establishing checking and savings accounts reduces the reliance on high-cost check cashing and loan services. It also allows a family to set goals for building savings and eventually assets for higher education, business start-up, retirement, life insurance, reliable transportation or a home. Research conducted over the past decade demonstrates that asset ownership increases household stability, decreases economic strain, and decreases the likelihood that a household's younger generation will live in poverty.</p> |
| HEALTH Improving People's Health | BASIC HUMAN SERVICES Ensuring a Strong Network of Basic Human Services |
| <p>Outcome: Increase access to physical, mental and dental services and benefits for uninsured and under-insured people</p> <p><u>Increasing access to healthcare services and benefits means that people who are not receiving care for health problems become connected to insurance coverage and health care providers.</u> Many working families are uninsured or under-insured because they do not receive healthcare benefits through employment; or they earn too much to qualify for public benefits yet not enough to pay for private insurance. Limited access to healthcare services and benefits compromises health status leading to increased school and work absence; and it can result in medical debt which drives many people into financial crisis. Good health allows children a better chance to stay on track in school and better equips adults to maintain and increase income through productive work.</p> <p>Outcome: TBD (Focused on Preventative Health measures)</p> | <p>Outcome: Meet people's emergency and transitional need for food, shelter, housing, safety and clothing</p> <p><u>The community is facing several trends that increase the demand for basic human services: more chronically homeless people; more homeless families and children; increased cost of living; high percent of low paying jobs; economic decline; increase in the number of working people accessing basic services; and, increased mortgage foreclosures.</u></p> <p>Food shelf use has increased dramatically during the past decade, a significant portion of food shelf clients are part of a working family. The already-strained local network of basic human services faces the challenge of keeping pace with increased demand while seeking new sources of revenue to replace funding reductions.</p> |

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1.8 HLUW 2017-18 Events Calendar

Stuff The Bus School Supply Drive (Superior-Douglas County & North Shore Area)

August 1-25, 2017

Select businesses in Superior, WI and Lake County, MN will be drop-off locations for donations of school supplies. Specific details can be found at hlunitedway.org.

26th Annual United Way Chili Cook-Off

Thursday, September 21, 2017, DECC

The region's largest chili cook-off draws over 1,000 chili lovers and over 40 chilies. Area chefs vie for bragging rights while the public joins the fun by sampling and voting for their favorite chili.

Family Volunteer Day

Saturday, November 19, 2017

This event allows families to come together to get a fun introduction to the importance of volunteerism in our community.

Day of Caring – Holiday Edition

Wednesday, Dec 6, 2017

United Way's Day of Caring (Holiday Edition) matches teams of volunteers with local non-profit agencies in need of some extra helping hands.

Bike Swap

April 21-22, 2018 Continental Ski and Bike

Join us for the 12th Annual Continental Ski & Bike "Bike Swap" supporting Head of the Lakes United Way! This event encourages the community to adopt a healthy & active lifestyle: sell or buy, and get biking!

Purple Ribbon Volunteer Recognition

April 15-22, 2018

During National Volunteer Week, participating businesses honor volunteers by providing anyone wearing an "I Volunteer" purple ribbon with a discount or special offer on their purchase.

HLUW "LIVE UNITED" Luncheon

Tuesday, May 8, 2018

Mark your calendars for our annual luncheon event, where we are excited to recognize the efforts of all of our partners - advocates, agencies, companies, donors, sponsors, volunteers and everyone that makes the effort to LIVE UNITED. Join us!

National Letter Carriers'

Stamp Out Hunger® Food Drive

Saturday, May 12, 2018

Participate in the largest one-day food drive in America! Simply place non-perishable food items by your mailbox by 9:00 am on 5/12/18. All food collected stays local.

Duluth Building and Construction Trades

Golf Scramble

Saturday, June 9, 2018

Get a team together and join us for a fun day of golf, great food, networking and prizes out on the green! All proceeds from the fundraiser go to the Head of the Lakes United Way.

Day of Caring

Wednesday, June 20, 2018

United Way's Day of Caring matches teams of volunteers who are eager to give back to the community with local non-profit agencies in need of extra hands. Volunteerism at its best!

**All event dates and details are subject to change. For the most up-to-date information, please visit hlunitedway.org*

LIVE UNITED

GETTING STARTED

2.1 What is an ECC? Role of the Employee Campaign Coordinator

As an Employee Campaign Coordinator (ECC), your primary role is to plan, coordinate and implement an effective Head of the Lakes United Way giving campaign in your workplace.

We rely on you to impress upon your colleagues the significant challenges that underserved populations in our region face every day, and to inspire your co-workers to make a commitment to Live United year-round.

Your Responsibilities:

- Attend ECC trainings or strategy meetings offered at the beginning of each campaign season.
- Work closely with your United Way staff account manager to develop an effective campaign plan.
- Recruit a campaign committee from key areas of your organization.
- Coordinate the distribution of campaign materials and the collection of pledge forms.
- Coordinate kickoff and recognition events.
- Promote the campaign within your organization.
- Publicize results throughout the campaign.
- Hold a separate meeting for Leadership givers and prospects.
- Provide all staff and retirees the opportunity to give.
- Thank donors and volunteers for their generosity.
- Complete the campaign by submitting the Campaign Report Envelope, workplace campaign survey and pledge forms to the United Way office.
- Evaluate and make recommendations for next year's workplace campaign.
- Consider participating in HLUW events year-round (Chili Cook-Off, Day of Caring, Annual Live United Luncheon, and more)

How to Succeed as an ECC:

Be sincere! *The most powerful appeals come from the heart.* Share your story with your coworkers; they will connect with your reasons for giving to United Way and be more likely to donate themselves. Enthusiasm and a positive attitude will help in your communications to your colleagues.

How United Way Helps You with Your Campaign:

Your United Way staff representative is always ready to assist you with planning and managing your workplace campaign. They have helped many other ECCs in our area put together programs that are successful, year after year. Whenever you need assistance, just reach out to your representative via phone or email.

Make sure you are on the list for our *Campaign Matters* ECC E-news for monthly updates from HLUW. You'll also find plenty of good advice, success stories, links to videos, and digital campaign materials online at www.hlunitedway.org, including all material found in this guide.

2.2 Six Ways to Engage with United Way

Head of the Lakes United Way provides opportunities year-round for companies to stay active in the community. By engaging in volunteer programs and outreach, employees will have a higher satisfaction in the workplace. In addition, people who volunteer and are engaged with United Way are more likely to donate.

Multiple Methods of Engagement

We encourage you to consider supporting United Way in multiple ways. There are six different ways for engagement. Join the challenge to participate in all of them!

2.2.1 Employee Workplace Campaign

Host a Workplace Campaign allowing United Way to share information with employees, and payroll or one-time donations to be collected. Read on for specific instructions, tips and tricks on holding an effective workplace campaign.

2.2.2 Organizational (Corporate) Gift

Contribute a monetary gift at the corporate or organizational level.

2.2.3 Special Events (Held on behalf of HLUW)

- Organizing Special Events where proceeds are donated to United Way
- Hold or sponsor community events such as a Golf Tournament or Bike Swap
- Internal workplace events such as auctions, bake sales, BBQs, bowling events, etc.

2.2.4 Sponsorship (Monetary or In-Kind)

Sponsor United Way events/activities, or provide an in-kind donation of a product or service. We offer many options for partnering through sponsorship. For more information, please visit our website at hlunitedway.org.

2.2.5 Leadership Giving

Recruiting Leadership level donors giving \$1000 or more per individual/combined giver relationship. Additional information on the Lake Superior Leadership Society is available in the Special Gifts section of this guide (Page 29).

2.2.6 Volunteer

Take part in Volunteer Opportunities with United Way:

- HLUW Board member or Committee member
- Head of the Lake United Way's Volunteer Center event such as Day of Caring
- Organize an on-site speed volunteering project at your workplace. For ideas, visit hlunitedway.org and view/download a packet of "Speed Volunteering Projects"

GETTING STARTED

2.3 Employee Campaign Coordinator Timeline/Checklist

4-5 weeks before the campaign

- Meet with your CEO
- Talk with previous Campaign Advocate
- Recruit your campaign team
- Analyze your past campaign
- Develop a budget
- Establish a corporate match

3-4 weeks before the campaign

- Attend ECC Training, or meet with your United Way staff representative
- Train your committee members
- Set your goals and objectives
- Set dates/times and notify your United Way Contact
- Review all campaign resources
- Plan your special events
- Schedule United Way speaker for meetings

One week before campaign

- Personalize pledge cards
- Send out endorsement letters
- Promote your campaign

Week of Campaign

- Confirm meeting location and time
- Connect with United Way contact
- Conduct special events
- Hold employee meetings
- Introduce program/agenda
- Show United Way campaign video
- Acknowledge management/CEO support
- Run retiree campaign

1-2 weeks after the campaign

- Follow up on pledge forms
- Report results promptly to United Way
- Report results internally
- Say thank you
- Analyze your campaign with your team
- Recruit next campaign advocate

Year round:

Your United Way contact can help you

- Start a year-round communication program
- Implement New Hires program
- Participate in United Way events
- Take employees on agency tours
- Identify and utilize employee testimonials

GETTING STARTED

2.4 8 Steps to a Successful Campaign



Define Internal Roles & Responsibilities:

- Recruit a team to help you run your workplace campaign
- Diversity is important – include people from various departments

Our Team:



Nail Down Logistics:

- Determine your timeline (1-2 weeks is a good length for a workplace campaign)

Campaign start date.....

Campaign end date.....



Set a Challenging and Attainable Goal:

- Review past campaign giving history – what areas of giving can be extended or increased? Are there ways to become more engaged?
- Identify growth potential in all types of giving – employee, corporate, special events, leadership, sponsorships and volunteer involvement

Our Campaign Goal/s



Plan Your Employee Campaign Activities

- Hold Rallies or special events
- Incorporate into trainings/meetings (i.e. safety meetings, staff meetings)
- Participate in volunteer projects
- For more resources, visit www.hlunitedway.org

Our rallies and activities will be held on.....



Organize Targeted Group Activities

- Recruit/invite upper management and organization leaders
- Inform attendees about the Lake Superior Leadership Society
- Start or run a retiree campaign

Our leadership giving meeting is.....



Communicate & Publicize the Campaign

- Email and personalized letters
- Posters in lobbies, kitchens/lounges, elevators
- Incentives & prizes: (You can order items from the UW store at www.unitedwaystore.com)
- Presentations: UW campaign staff available to present and share info
- HLUW materials (brochures, posters, campaign video, pledge forms, casual day sticker template and more!)

What methods you will use.....

.....



Thank Donors & Employees

- Ensures employees have a positive experience & continue to donate
- Thank donors, employees & campaign team at the end of the campaign (prize drawings, luncheons, & personal letters)

How you will thank donors and employees.....

.....



Employee Campaign Wrap Up

To report campaign results, complete the front of the envelope, seal with pledge forms and payments, & deliver to HLUW or call for pick up.

Remember:

- Record the total number of employees and donors
- Include contact information (phone and email) in case we have questions about the pledge
- Make sure each donor selected a geographic area for their gift
- Ensure designation and/or credit forms are attached to pledge forms, as indicated by donor
- Be sure to calculate the total for all employee and corporate gifts and special events
- Remind donors to keep their copy of the pledge form for tax purposes

Results will be turned in to HLUW by.....

2.5 Making the Ask – Talking Points

People give to Head of the Lakes United Way because they believe in what we do. Your knowledge, enthusiasm and commitment to supporting United Way are key to encouraging employee pledges. Sincerely communicating your commitment to supporting the community through United Way really does make a difference.

Having one-on-one conversation is the most effective way to ask. Prepare yourself by reading up on United Way's mission, vision and impact in the community. Demonstrate your commitment and enthusiasm for United Way. Your coworkers will recognize your passion and be more likely to donate.

Five Steps to a Successful Ask

There are more successful ways to ask than merely leaving a pledge form in employees' mailboxes. Here are some personal, engaging steps to take when asking for employee pledges.

1. *Get the donor's undivided attention.*

Try to catch the donor on a break, at a staff meeting or at an organized staff event and ask him or her to consider participating in the campaign.

2. *Explain the purpose of United Way and why you support our mission.*

Bring United Way materials and be prepared to explain them. Share a personal story and/or provide United Way facts and statistics.

3. *Ask.*

Explain why you donate and ask if they would consider making a contribution or increasing their pledge. Donations of any size benefit the community. Consider suggesting a donation of a specific amount per pay period.

4. *Address concerns and questions.*

Know your materials, answer questions honestly—never guess. If you don't know the answer to a question, let the donor know you will find out and then follow up with your United Way staff representative. Recognize that some donors have real concerns; people have a right to feel good about their gift. If any of your colleagues would like to contact United Way staff directly with questions, encourage them to do so. Your representative is here to help.

5. *Say thank you.*

GETTING STARTED

2.6 Running a Workplace Campaign: FAQ

When should our campaign take place?

Most workplace campaigns occur between early September and mid-December; however, they can take place any time of the year. Final results are typically published each April.

How long should our campaign last?

Most campaigns can be wrapped up in two or three weeks. The goal is to distribute and collect pledge forms while the United Way message is still fresh in employees' minds. However, every workplace is different. We can work with you to figure out what is best for your organization.

I have limited time to devote to a campaign. How can I work it into my busy schedule?

Reach out to your United Way representative. They are there to help you every step of the way. Let them know your limitations and come up with a plan together to make it easier for you. Another way to ease the strain is to recruit a committee. Assign tasks and assume a management role. Most importantly, start planning early. The earlier you start, the easier the process will be for you.

Our work environment is not conducive to holding a campaign kickoff meeting. How can I involve our employees in the campaign experience?

Take the campaign to them. Some ideas are to use e-mails, voice mails, videos and/or letters from the CEO/president to get the word out. Designate one room as the United Way Room and have participants play games on their breaks and turn in pledge forms for prizes. Use your company's intranet to provide information and results. Create and distribute a company video starring your colleagues sharing their reasons for Living United.

When do payroll contributions start?

The most common payroll contribution period usually runs from January 1 through December 31. Some companies use their fiscal year as their schedule for payroll contribution. United Way does not set your payroll schedule; it is a company decision.

Other questions?

Encourage employees to contact your United Way staff representative directly with any questions or assistance they might need. Should you not have the answer to a United Way related question or concern, HLUW staff is here to help.

2.7 Strategies to Increase Giving and Participation

Must-Do Strategies

- Obtain CEO and top management support and endorsement.
- Communicate increasing community need to the donor.
- Connect the donor's personal philanthropy with helping people in need.
- Ask all employees to contribute. Make sure everyone has the opportunity to give.
- Set internal goals based on potential.
- Meet with your United Way staff representative.

Should-Do Strategies

- Recognize the contributor's previous support.
- Utilize company time for coordinator and committee trainings.
- Utilize tours, speakers, testimonials and per community statistics. Your United Way staff can schedule these for you and offer ideas.
- Hold employee meetings to present reasons for increased contributions. Show a United Way video and invite a speaker from United Way.
- Show immediate appreciation to donors and potential donors.
- Plan use of campaign materials and activities.

Could-Do Strategies

- Use incentives (drawing, etc.) for employees that increase gifts.
- Send out endorsement letters setting company goals.
- Meet with past Employee Campaign Coordinator for additional ideas and strategies.

GETTING STARTED

2.8 Increasing Campaign Participation: Using Incentives

Using incentives is a great way to motivate people to participate in different aspects of your campaign from attending meetings to turning in a pledge form. The key to using incentives is to figure out what motivates employees at your organization. Incentives can be small (a piece of candy), free (a reserved parking spot) or large (event tickets) depending on your goal(s) and budget. One easy way to build incentives into your campaign is to create friendly competition into your campaign activities. Some people will go to great lengths to be crowned the winner.

When to Use Incentives:

- Encourage first-time donors to make a gift
- Promote attendance at meetings or campaign events
- Persuade colleagues to turn in their pledge form by a certain date
- Encourage a pledge increase or leadership gift

Incentives if you DON'T have a budget:

- Casual day stickers
- Prime parking spaces
- Pass for a long lunch
- Pass for "sleep in late" day
- Company merchandise/apparel
- Pot luck
- Traveling trophy for department with highest participation or percentage increase
- Car started & windows scraped every day for a week
- Donated items or gift certificates from vendors or local merchants

Incentive Ideas if you HAVE a budget:

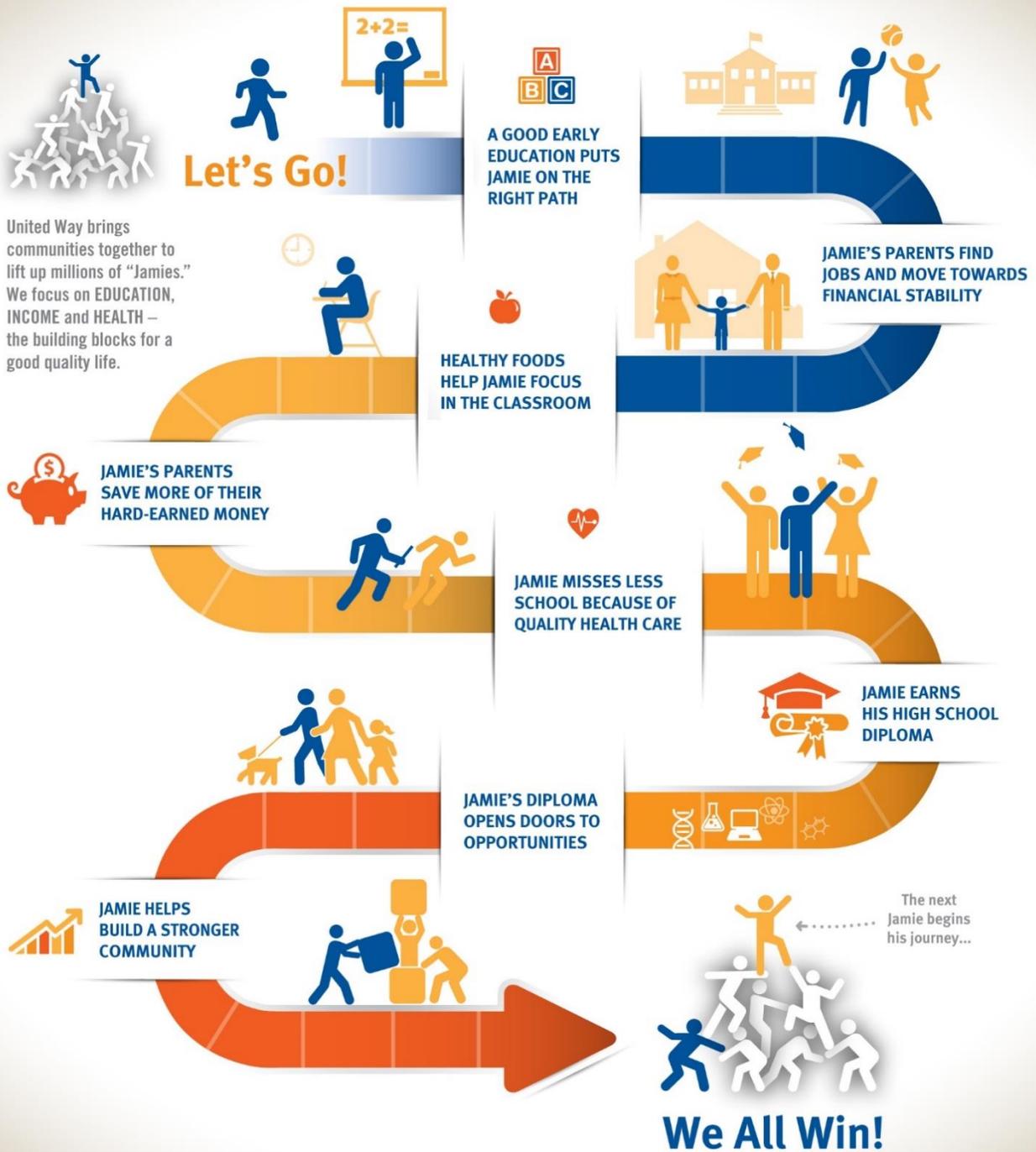
- Candy
- Free food
- Vacation time
- Celebration or department lunch
- Movie passes
- Gift certificates
- Tickets to local sporting events or theatre events
- Weekend getaways
- Salon/Spa services
- Gas and car wash certificates

Where to get incentives:

- Your company (Swag or Logo items)
- Your vendors
- Local businesses
- Managers or other employees
- <http://www.unitedwaystore.com>

WHERE THE MONEY GOES

Meet Jamie.  Jamie is a child who wants to succeed. All he needs is an opportunity.

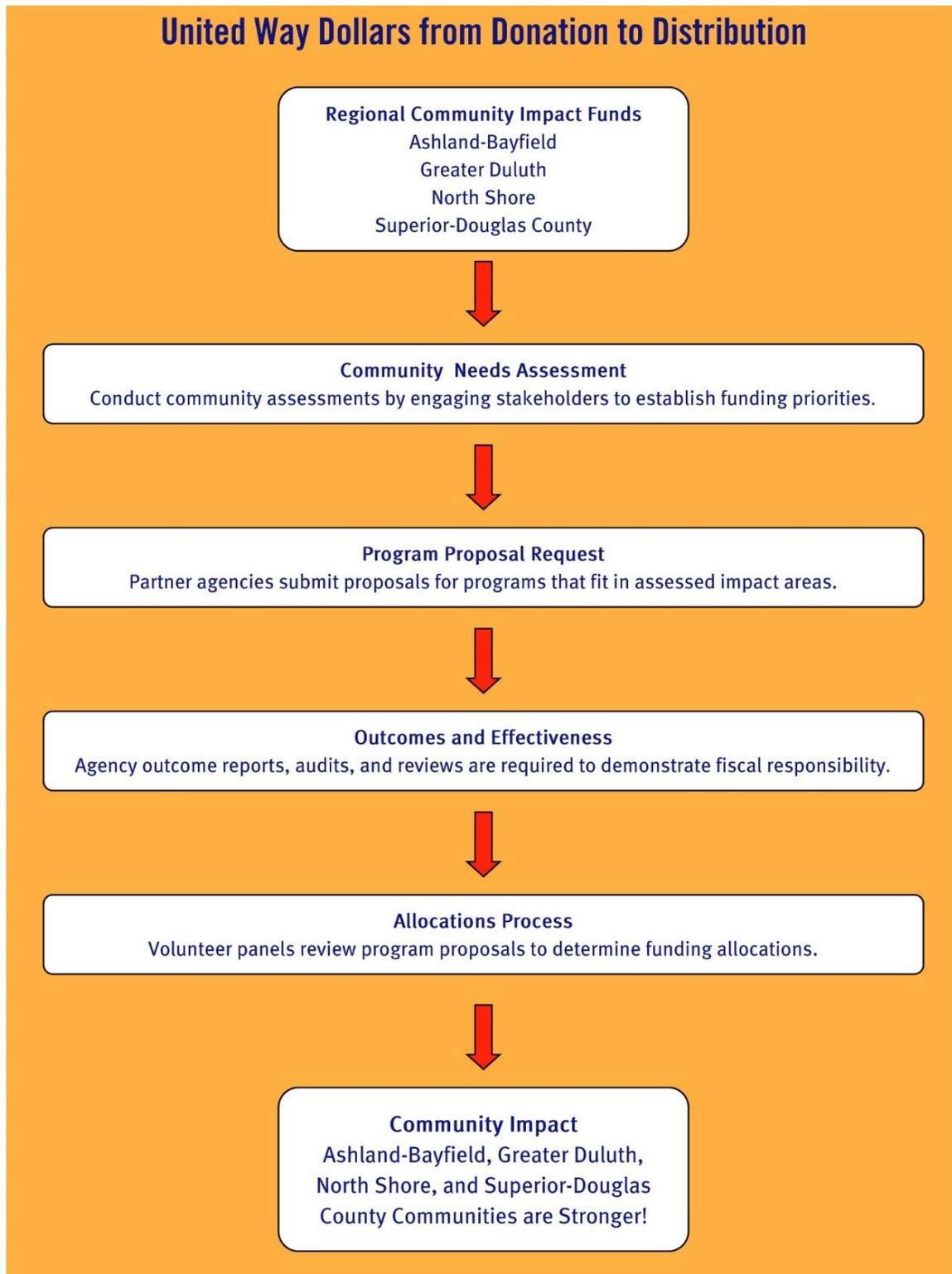


To learn more about how even a small change can strengthen your community, check out our interactive Common Good Forecaster. www.UnitedWay.org/forecaster



WHERE THE MONEY GOES

3.1 Your Gift at Work



WHERE THE MONEY GOES

3.2 Managing Objections and General FAQ

Some of your coworkers may have objections to donating to United Way. Listen to what is being said. Listening promotes openness and acceptance. Objections are not personal. Often, just talking to a person about why giving is important and finding out what that person's personal priorities are can ease the process.

- **Do Not Argue** if you receive objections from someone you are soliciting.
- **Answer Objections with Facts: Say Thank You.** Regardless of the prospect's response, always leave with a smile and a thank you.
- **Remember to Think Long-Term:** Every question provides an opportunity to communicate how United Way is building a stronger community for everyone in the region. You may not get the person to pledge this year, but you are planting the seeds for the future.
- **Consider inviting them to participate in other HLUW activities.** By volunteering or attending events, people are more likely to make a donation to the organization.

Talking Through Common Objections and Questions:

How does United Way invest my gift?

Every two years, more than 60 trained volunteers work with our staff to carefully review the management and effectiveness of the programs we partner with and use this information to determine funding levels. This information is focused on results. The four key factors in these results include:

- Program accountability
- Demonstrated lasting change in people's lives
- Efficiently and effectively run programs
- Programs that are responsive to changing community needs

How does United Way establish its focus on community issues?

United Way continually assesses and evaluates the changing needs of our communities. Local volunteers utilize feedback from focus groups and community experts to identify our impact areas: Basic Needs, Health, Education, and Income. In addition, United Way brings together our community to identify and address special issues through partnerships and initiatives.

Why do programs want to affiliate with United Way?

A partnership with United Way means that the program has met strict accountability standards and financial management guidelines - while showing measurable results. While agencies receive endowments, grants, etc., United Way dollars provide for fundamental programs addressing identified community issues. United Way dollars may also generate additional revenue through grants from local, state, and federal governments.

Are all United Ways the same?

Though United Ways around the world share a logo and have similar missions, each United Way is independently incorporated and is led by local staff and volunteers. The work of each United Way is determined by its community needs.

What is the easiest way to contribute?

Payroll deduction is by far the most convenient method of contribution. A small amount is taken from your paycheck each payday, allowing you to make a small contribution each pay period that can make a big difference in the course of a year. Talk to your payroll office about how you can make a payroll pledge to United Way!

Donations can also be made online at www.hlunitedway.org or by mailing a check to Head of the Lakes United Way at 424 West Superior Street, Suite 402, Duluth, MN 55802.

I give directly to XYZ charity/organization. Why should I give to Head of the Lakes United Way?

Charitable giving is a personal and voluntary decision and United Way encourages you to do what is most comfortable to you.

A gift to United Way is an investment that benefits the entire community, not just one program, issue, or population. Every dollar you give to United Way creates opportunities and inspires hope for a better tomorrow. Your gift to United Way supports the foundation of our community through the work of local programs that impact people's lives in a real and meaningful way. Your gift to United Way not only provides a "hand up" to someone who needs it – but it impacts all of us who live and work here.

United Way is the most effective way to direct your charitable donations to address the most pressing needs in our community. We connect resources to accelerate community wide solutions. By bringing area nonprofits, government, business and volunteers together, we improve people's lives by mobilizing the caring power of this region.

Giving to United Way is the most efficient way to give because:

- United Way adds value to your contribution by providing annual eligibility requirements for nonprofits' budgets and programs, ensuring that your gift is being used effectively.
- United Way annual campaign efforts give area nonprofit organizations a reliable source of funding without having to allocate their own scarce resources to solicit individual contributions. These organizations can count on United Way to cost-effectively promote and administer a single campaign that raises money for many causes at once.
- While you may give to other worthy causes as well, view your United Way gift as a "gift to the community" because it supports a network of member nonprofit organizations with wide-reaching impact throughout the whole community.
- When you contribute to Head of the Lakes United Way directly, you are investing in targeted solutions and programs within our community.

WHERE THE MONEY GOES

I would like my gift to be used in my home community – how can I assure this happens?

Head of the Lakes United Way's service area includes four geographic areas: Ashland-Bayfield Counties, Greater Duluth, North Shore of MN, and Superior-Douglas County. Simply indicate the geographic area on your pledge form by checking the box for the area where you would like your donation to be used.

Can I designate a portion of my contribution to a specific agency? What if I don't want my money to go to a certain agency?

An undesignated gift to the Community Care Fund is the most effective way to maximize the impact of your gift. Your gift will combine with the gifts of others to make the greatest impact in the lives of those who need it most.

However, Head of the Lakes United Way recognizes that individuals may have a strong connection to specific agencies. For this reason, we will honor designations to our funded partners and other United Ways. Simply fill out a designation form and attach it to your pledge form. If the agency to which a donor designates is not eligible for HLUW designations, United Way will contact the donor and offer to return the gift and/or designate the gift to the appropriate impact area.

Because not every agency appeals to every donor, United Way will also accept designations "away from" a particular agency as well.

How much of my contribution goes to the people who really need help?

Head of the Lakes United Way takes the business of managing your donation very seriously and performance exceeds Charities Review Council guidelines. Only 14% of funds are used for resource development and only 6% are used for administrative costs. Low overhead ensures that the majority of your money goes to people in need.

If I stop working for my current employer, what happens to my payroll-contribution pledge?

Your pledge will not automatically be routed to your new place of employment or to your home. If you do change jobs or are no longer working, please contact United Way staff at (218) 726-4770. At that time, you can decide whether you are able to fulfill your original pledge or adjust it. If you have switched jobs and your current employer runs a United Way campaign, it is possible to set up payroll contribution through the new employer.

My partner gives for both of us, why should I give to Head of the Lakes United Way?

Research indicates that donors perceive that one of the most significant benefits of personal giving is the feeling of being part of a collective effort to solve problems and make a difference in their community.

Be a part of your workplace community by joining with fellow employees in the United Way effort.

WHERE THE MONEY GOES

I'm never going to use these services, so why should I give?

You can never predict when you may need services. We are all one life event away from needing help. At one time or another, almost everyone has a health and human service issue and may need help. Most likely, you or someone you know has used services provided by United Way partner nonprofit organizations.

Some of our employees and their families are on tight budgets; should we invite them to be part of the campaign?

Yes, most people appreciate the opportunity to participate. Giving through payroll deduction is easy and convenient. Payroll deduction allows everyone to participate by spreading the contribution over time. This allows those on tight budgets to participate and be part of the solution. Even a small amount per pay period makes a difference.

How can I be sure my donation will be used efficiently and effectively?

Every United Way is local and autonomous, including Head of the Lakes United Way. When you give where you live, you support Head of the Lakes United Way's work. Our programs and initiatives deliver services through partner nonprofits throughout the Ashland-Bayfield, Greater Duluth, North Shore, and Superior-Douglas County areas.

Head of the Lakes United Way annually reviews each funded program to ensure financial responsibility and operational effectiveness.

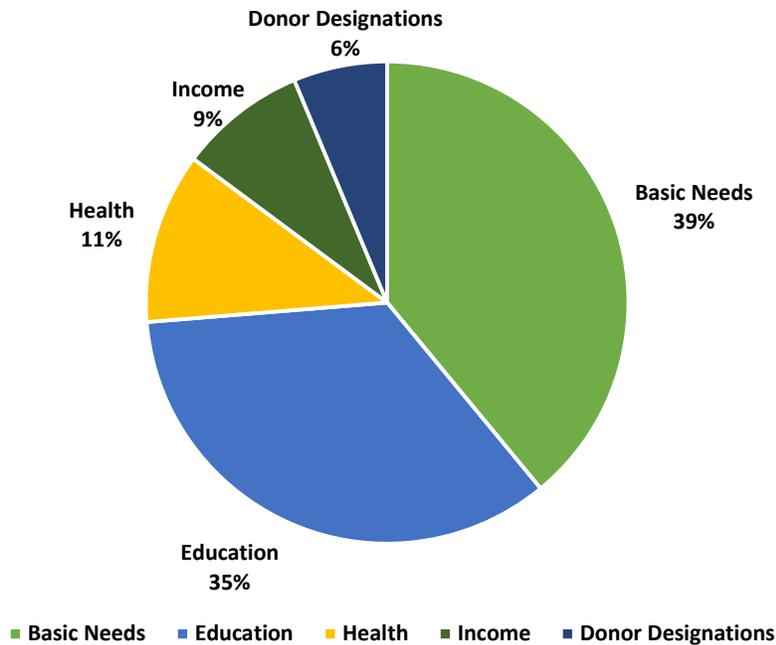
United Way employs a financial reporting system including annual member non-profit independent audits. Internal financial checks and balances were created to ensure United Way's stability and accountability.

Remember, if you need help answering questions, the HLUW staff is available to support you!

WHERE THE MONEY GOES

3.3 How Your Donations are Used

2017 Regional Allocations Distribution



- 1,984,574 meals served
- 361,879 articles of clothing distributed
- 60,604 hygiene and food kits/supplies distributed
- 51,046 nights of shelter provided
- 87,049 referrals made to connect people to needed services
- 20,695 people received case management or counseling services
- 11,321 uninsured or underinsured people received dental treatment
- 8,861 youth served through out of school time programming
- 6,840 people received legal advocacy or court assistance
- 5,571 uninsured or underinsured people received physical health treatment
- 1,814 at-risk youth received supportive services
- 1,500 people received support in filing taxes



5,105
NUMBER OF UNINSURED OR UNDERINSURED PEOPLE WHO RECEIVED PHYSICAL HEALTH TREATMENT

1,500
NUMBER OF CHILDREN WHO RECEIVED MENTAL HEALTH SERVICES



4,215
NUMBER OF KIDS WHO RECEIVED DENTAL SERVICES



6,766
NUMBER OF UNINSURED OR UNDERINSURED PEOPLE WHO RECEIVED DENTAL TREATMENT

HEALTH



INVESTMENT  **REPORT 2016**
Head of the Lakes United Way

BASIC NEEDS · EDUCATION · HEALTH · INCOME




2,300 PEOPLE RECEIVED SUPPORT IN FILING TAXES

1,451 ASSISTED TAX RETURNS FILED

\$3.1M FEDERAL & STATE TAX REFUNDS CLAIMED BY ASSISTED TAX PAYERS

1,273 PEOPLE RECEIVED FINANCIAL COACHING

147 HOUSEHOLDS RECEIVED FORECLOSURE PREVENTION EDUCATION

411 INDIVIDUALS RECEIVED EMPLOYMENT COACHING



INCOME

PEOPLE WITH DISABILITIES WHO RECEIVED LIVING SUPPORT (FINANCIAL & EMPLOYMENT): **543**



2,361

NUMBER OF PEOPLE WHO RECEIVED EMERGENCY ASSISTANCE

52 FAMILIES IN CRISIS RECEIVED ASSISTANCE

48,771 NIGHTS OF SHELTER PROVIDED

477,190

ARTICLES OF CLOTHING DISTRIBUTED TO PEOPLE IN NEED



51

TRANSITIONAL HOUSING UNITS PROVIDED

92 PEOPLE OBTAINED AFFORDABLE HOUSING



BASIC NEEDS

NUMBER OF MEALS SERVED:

286,846

POUNDS OF FOOD DISTRIBUTED: 157,732

1,981 PEOPLE RECEIVED LEGAL ASSISTANCE



INVESTMENT



Head of the Lakes United Way

REPORT 2016

BASIC NEEDS · EDUCATION · HEALTH · INCOME



664

SENIORS CONNECTED TO VOLUNTEER & SOCIAL PROGRAMMING

EDUCATION

444

NUMBER OF PEOPLE WHO ATTENDED HOMEBUYER EDUCATION CLASSES



11,919

NUMBER OF YOUTH IN OUT OF SCHOOL TIME PROGRAMMING

955 NUMBER OF AT-RISK YOUTH THAT RECEIVED SUPPORTIVE SERVICES



NUMBER OF CHILDREN ENROLLED IN MENTORING PROGRAMS

627

176 CHILDREN PARTICIPATED IN FUNDED EARLY CHILDHOOD PROGRAMS

314 MEN ATTENDED NON-VIOLENCE CLASSES

WHERE THE MONEY GOES

3.4 2017-18 HLUW – Partner Agencies/Programs

ASHLAND-BAYFIELD

New Day Shelter

- 🏠 Basic Services Program

Northlakes Community Clinic

- ✚ Superior Smiles Enhancements

School District of Bayfield

- 📖 Homework Zone

The BRICK Ministries, Inc

- 🏠 Benevolence Program

GREATER DULUTH

American Red Cross serving Northern MN and Douglas County WI

- 🏠 Disaster/Emergency Services

Arc Northland

- ✚ Family/Child Mental Health
- ✚ FASD Intervention

Boys & Girls Clubs of the Northland

- 📖 Education/at-risk youth

Center City Housing Corp.

- 📖 Early Childhood
- 🏠 Transitional Housing

Children's Dental Services

- ✚ SMILES

CHUM

- 🏠 Drop-in Center
- 🏠 Emergency Shelter

Community Action Duluth

- 🔧 FAIM- Asset Development
- 🔧 Jump Start
- 🔧 Tax Preparation

Courage Kenny Rehabilitation Institute - Northland

- ✚ Courage Center Duluth

Damiano Center

- 🏠 Clothing Exchange
- 🏠 Kid's Café
- 🏠 Soup Kitchen

Domestic Abuse Intervention Programs - DAIP

- 🏠 Domestic Abuse Intervention

Duluth Area Family YMCA

- 📖 Community Services
- 📖 Little Treasures Childcare Center
- 📖 Out-of-School Time Program

Girl Scouts of MN & WI Lakes and Pines

- 📖 At-Risk Outreach

Goodwill Industries Vocational Enterprises, Inc.

- 🔧 Community Employment

Human Development Center

- ✚ Family/Individual Counseling

Lake Superior Community Health Center

- ✚ Health Care Access

GREATER DULUTH (cont.)

Legal Aid Service of NE MN

- 🏠 Duluth Legal Services
- 🔧 Expungement Project

Life House

- 🏠 Basic Needs
- 📖 Futures Education Program
- 🔧 Futures Employment Program
- ✚ Kids to Adults KATS

Lutheran Social Services

- 🏠 Bethany Crisis Nursery
- 🔧 Consumer Credit Counseling
- 🔧 Foreclosure Prevention
- 📖 Together for Youth
- 📖 Truancy Action Project

Men As Peacemakers

- 📖 Boys Restorative Program
- 📖 Girls Restorative Program

Myers-Wilkins Community School Collaborative

- 📖 Academic and Cultural Enrichment

Positive Energy Outdoors

- 📖 Low-Income Youth Outreach

Safe Haven Shelter and Resource Center

- 🏠 Legal Advocacy

Salvation Army - Greater Duluth Area

- 🏠 Emergency Assistance
- 🏠 Family Transitional Housing
- 🏠 Food Services

Second Harvest Northern Lakes Food Bank

- 🏠 Backpack Program
- 🏠 Duluth Food Bank

SOAR Career Solutions

- 🔧 Re-entry Services
- 🔧 Subsidized Employment Services

The Hills Youth and Family Services

- 📖 Neighborhood Youth Services

Valley Youth Centers of Duluth

- 📖 Youth Development and Supportive Service

Volunteer Attorney Program

- 🏠 Volunteer Attorney

YWCA of Duluth

- 📖 Early Childhood Center
- 📖 Girls and Youth Programs

NORTH SHORE

Care Partners of Cook County

- 🏠 Senior Chore

Community Partners

- ✚ Socially Active Seniors
- 🏠 Volunteer Services Program

Just Kids Dental

- ✚ Dental Literacy

NORTH SHORE (cont.)

North Shore Area Partners

- 🏠 Volunteer Services

North Shore Collaborative

- 📖 LOTS: Learning Opportunities Through Stories

North Shore Horizons

- 🏠 24-hr Domestic and Sexual Violence Crisis Intervention

Two Harbors Area Food Shelf

- 🏠 Food Shelf Program

SUPERIOR-DOUGLAS COUNTY

American Red Cross serving Northern MN and Douglas County WI

- 🏠 Disaster Services

Boys & Girls Clubs of the Northland

- 📖 Education/at-risk youth

Catholic Community Services, Inc.

- 📖 Foster Grandparents
- 📖 RSVP Bookworms Project

Center Against Sexual and Domestic Abuse, Inc – CASDA

- 🏠 Emergency Shelter Services

Challenge Center

- 🏠 Community Living Support Services

Douglas County 4-H

- 📖 At-risk Youth

Harbor House Crisis Shelters – HHCS

- 📖 Children's Life Skills Enhancement
- 🏠 Homeless Stabilization Project

Health Care Clinic

- ✚ At-risk Youth Outreach

Human Development Center

- 🏠 Runaway/Homeless Youth Program

Just Kids Dental

- ✚ Dental Literacy

Lake Superior Community Health Center

- ✚ Health Care Access

Lutheran Social Services of Wisconsin and Upper Michigan, Inc.

- 🔧 Financial Counseling

Mentor Superior (Duluth Area YMCA)

- 📖 Mentor Superior-Douglas County

Salvation Army of Superior

- 🏠 Homelessness Initiative and Prevention

School District of Superior

- 📖 After School Program

Superior Douglas County Family YMCA

- ✚ YMCA Membership Scholarships

Superior Vocations Center Inc.

- 🏠 Representative Payee Program

WHERE THE MONEY GOES

3.5 How Your Dollars Help in Each Community within the Head of the Lakes Service Area

3.5.1 Ashland-Bayfield Counties

- \$25 provides 20 domestic/sexual abuse victims to receive advocate assistance with filing a restraining order
- \$33/week allows domestic/sexual abuse victims to receive weekly emotional group support
- \$5/week helps keep a family in their home, instead of facing eviction
- \$2.50/week shelters a homeless family in a motel room for three nights

3.5.2 Greater Duluth

- \$.82/day provides funding for 12 students to go on a cabin retreat where they build relationships with each other
- \$1/day provides 20 families with 16 hours of financial literacy and home buying education
- \$3.25/week provides a weekend supply of food to a Greater Duluth child in need as part of our weekend backpack Program
- \$15/week covers the cost of a 30-day shelter stay
- \$100 equals 300 hot meals to hungry at-risk kids in our community

3.5.3 North Shore of Minnesota (Lake and Cook Counties)

- \$5 provides two complete meals for a family of three
- \$28 provides coordination and delivery of a week of frozen Meals on Wheels
- \$10 provides a senior with grocery shopping assistance
- \$6/week provides an oral health screening, dental cleaning, fluoride varnish application, oral hygiene instruction, and new toothbrush, toothpaste, and floss for 17 uninsured children

3.5.4 Superior-Douglas County

- \$.07/week purchases one of 8 books for a child participating in the Bookworms program
- \$1/week will pay for all of the smoke detectors needed to be installed in an at-risk home
- \$1.54/week provides 25 days of safe shelter for a family of four fleeing violence
- \$5/week for a year pays for seven children to attend 4-H summer camp
- \$6/week provides hygiene kits for 50 individuals

SPECIAL GIFTS

4.1 Lake Superior Leadership Society

The Leadership Giving program is designed to encourage and recognize individuals in our community who make gifts of \$1,000 or more to the community through the annual United Way Campaign and makes up about 30% of total donations. Conducting a Leadership Giving campaign is one of the best ways to increase the success and impact of your company's overall campaign. As an integral part of your employee campaign, Leadership Giving allows your employees to make a meaningful difference and sets your organization apart as a leader in our community.

Lake Superior Leadership Society Levels

- Tocqueville \$10,000 and over
- Innovator \$5,000 to \$9,999
- Visionary \$3,500 to \$4,999
- Pacesetter \$2,000 to \$3,499
- Friends \$1,000 to \$1,999

Leadership giving is an opportunity for contributors to maximize their gifts' impact. Contributions at leadership levels (\$1,000+) will go a long way toward creating opportunities for a better life for all.

Community Benefits

- **Access to New Resources** – New dollars from leadership giving donations enhance the ability of United Way to efficiently respond to emerging community needs.
- **Recognition of New Community Leaders** – Leadership donors are recognized as community leaders.
- **Increased Community Spirit** – Leadership donors have increased pride in the community and desire to participate in community activities.

Donor Benefits

- **Community Awareness** – A formal leadership giving program improves communication, increases understanding and awareness of community needs.
- **Positive Image** – Leadership donors are perceived as positive role models for their peers helping to increase the level of participation and total dollars raised throughout the community.
- **Personal Satisfaction** – As a leadership donor, you are giving back to the community. You are making a difference in the lives of people each and every day.

SPECIAL GIFTS

Steps for a Successful Leadership Giving Campaign

Gain CEO and Leadership Support

- Ask the CEO to appoint a well-respected member of senior management who is already giving at the Leadership level to lead your company's Leadership solicitation.
- Engage your CEO and senior management in leading, implementing and executing Leadership Giving.
- Meet with your management staff to help them to understand the importance of Leadership Giving.

Develop Your Strategy

- Develop a plan for meeting with potential donors. Determine what would be most appropriate for your organization: CEO breakfast, luncheon or "happy hour" reception.
- Make one-on-one requests of current and prospective Leadership donors.
- Secure Leadership gifts early by holding a Leadership drive prior to the company-wide campaign kickoff. This allows company leaders to set the pace for the campaign and lead by example.
- Set goals for Leadership Giving: increase awareness, increase number of leadership donors, increase per capita giving.

Make the Ask

- Invite a United Way speaker to attend the event and share a personal story.
- The CEO should be present at the Leadership kickoff and ask colleagues for their personal contributions.
- Promote Leadership Giving throughout your employee campaign.

Thank All Leadership Givers

- A senior manager should send a personal thank you to all Leadership donors.
- All Leadership donors should be visibly recognized, unless they wish to remain anonymous, in order to encourage others

SPECIAL GIFTS

4.2 Take STOCK in United Way

Why Give Stock?

By giving stock held for at least a year, the 15 percent capital gains tax typically incurred can be potentially eliminated if you sell. Stock donations to public charities, like United Way, are eligible for a charitable tax deduction on both federal and state taxes—adding up to potentially big savings.

A charitable contribution of long-term appreciated securities — i.e. stocks, bonds and/or mutual funds that have realized significant appreciation over time — is one of the most tax-efficient of all ways to give. This method of giving can be particularly advantageous in today's market. Make sure to help your employees see how a gift of securities can be the most cost-effective way to improve their community!

If you would like additional information, please email us at finance@hlunitedway.org or call (218) 726-4770.

This information is illustrative only and is not intended to be legal or financial advice. Consult your own attorney or financial advisor to discuss your specific situation.

4.3 Planned Giving

Gifts to the United Way Endowment Fund are carefully invested to support the donor's tradition of caring. The gift is carried on from generation to generation. In addition, many planned gifts provide substantial tax advantages to the donor. The United Way Endowment Fund accepts gifts through wills and estate plans that provide a continuing source of revenue separate from the annual campaign.

Planned gifts could include annual gifts to the endowment fund of cash and securities, or future gifts including:

- **Bequests:** Designating a specific amount of money, a percentage of your estate, or a specific property, you help ensure a future of support.
- **Life Insurance:** Contributing a policy you own, assigning dividends as a gift, or naming Head of the Lakes United Way as beneficiary can provide support for those in need and provide tax benefits to you.
- **Property:** Gifting donations of real estate, jewelry, or other valuables may also provide significant tax benefits.
- **Memorial Gifts:** Directing donations for annual recognition or in honor of a loved one.
- **Other Planned Gifts:** Establishing a charitable remainder trust, lead trust, or other planned gifts.

For more information about planned giving, please contact Michelle Hargrave at 218-726-4771 or mhargrave@hlunitedway.org.

4.4 Retiree Engagement – RETIRE UNITED

United Way needs your help to track and retain retirees! We want to stay in touch with donors when they leave your company. You know your workplace best; let us know how we can continue outreach.

Here are some ideas:

- Include the HLUW retiree brochure in the exit information packets
- Publish info about United Way news and events in retiree newsletters
- Send out a retiree letter on behalf of United Way during your workplace campaign

Talk to your HLUW staff representative to get copies of the Retire United brochure, and to share ideas and create a plan!

Running a Retiree Campaign

Phase 1 – Planning

- Involve retirees or retiree groups in planning/solicitation and incorporate their campaign into the company's regular employee campaign.
- Decide whether the retiree solicitation will be through direct mail and print media only or if it will involve a special retiree rally/event/reunion.
- Offer a variety of payment options: automatic bank or credit card payment; automatic deduction from the retiree's pension check; monthly or quarterly billing through United Way's direct bill method; securities gift or cash/check gift. United Way can help you design a special pledge card.
- Retiree gifts will count towards your company's campaign total.
- Give retirees the opportunity to give to Head of the Lakes United Way or to designate to another community where they live now (e.g. Arizona, Florida, or Texas.)

Phase II - Communication

- Offer retirees the opportunity to go on agency tours and/or participate in campaign events with company employees.
- Communicate to the retiree that they are a vital individual who is important to the community.
- Personalize the letter, if possible, and send it from a known and respected retiree or from the chair of the campaign. Using larger type for these letters can make reading easier for retirees.
- Supply information on United Way 2-1-1 and volunteer opportunities.
- If possible, offer the same incentives to retirees as to employees.
- Provide a tailored pledge card that reflects their payment options and a pre-paid return envelope.
- Don't forget a THANK YOU with the results of the retiree campaign and company's employee campaign.

SPECIAL GIFTS



Ask your United Way staff representative for copies of our current brochures to hand out to your employees.

4.5 Emerging Leaders

About United Emerging Leaders

Head of the Lakes United Way (HLUW) Emerging Leaders program is a comprehensive training program for individuals who are interested in serving on non-profit boards and engaging in group volunteer activities across the Twin Ports. It's an exciting opportunity for young professionals to leverage their leadership skills through volunteerism and gain an understanding for what it takes to become successful board members.

Benefits

- Complete a Board service training program that will equip you with skills to be successful on a Board
- A chance to make an impact by taking part in meaningful activities including volunteer projects and community events
- Opportunities to strengthen your network by connecting with area professionals
- Gain a deeper understanding of a variety of health and human service agencies in the area
- Head of the Lakes United Way will serve as a resource as members seek Board opportunities

ENDORSEMENT LETTERS

5.1 New Hires - Welcome Letter

Below is a sample endorsement letter to promote your campaign in the workplace. Be sure to put this on your company letterhead and personalize it whenever possible for greatest impact.

Dear (name of new employee):

Congratulations and welcome to your new job! Today you have the opportunity to join us in something we are very proud to be a part of -- supporting Head of the Lakes United Way.

Our community is stronger because of our investment in United Way. We are improving people's lives by uniting caring people and mobilizing resources to empower individuals and strengthen communities.

We envision our community as a place where all thrive. United Way is reaching their goals and accelerating solutions in the following impact areas:

- Basic Needs
- Education
- Health
- Income

We hope you will join us in making a very important investment by choosing payroll deduction or making a cash donation to Head of the Lakes United Way.

Thank you,

(CEO name and signature)

ENDORSEMENT LETTERS

5.2 CEO Letters – Supporting the Campaign

Endorsement Letters: CEO – Sample 1

Below is a sample endorsement letter to promote your campaign in the workplace. Be sure to put this on your company letterhead and personalize it whenever possible for greatest impact.

Dear (Name),

One of the most difficult things to do is to ask for help. Yet all of us at some time in our lives will desperately need help from those around us. Friends, doctors, hospitals, counselors . . . when we need help, it is a wonderful feeling to reach out and find open arms and hearts ready to lend the assistance we need.

We may go through life for years fortunate in avoiding hardship within our family - illness, accident, crisis or even death. Every day, others around us are dealing with these facts of life. Eventually, we all have to face difficult times.

Through Head of the Lakes United Way, your dollars will be leveraged effectively to address critical needs in basic needs & education. Their success depends upon the support you and I provide.

Please take a few moments during our Head of the Lakes United Way campaign to reflect on these thoughts and decide what you can do to help make our community able to meet our needs. Remember, underneath everything we are, underneath everything we do, we are all people, connected, interdependent, united. And when we reach out a hand to one, we influence the condition of all.

Thank you for caring. Best Regards,

(CEO Name & Signature)

ENDORSEMENT LETTERS

Endorsement Letters: CEO – Sample 2

Here is another example of an endorsement letter to promote your campaign in the workplace.

Dear (Name),

(Company Name) is gearing up to run another exciting Head of the Lakes United Way campaign. Each year we set a challenging goal for our employees, and this year will be no exception. (Company) has committed to raising (goal)!

Your contribution advances the common good. We all win when everyone has the basic needs in life: when a child succeeds in school and when families are financially stable. These results have benefits that ripple out to the community.

(Company) is asking for your support by participating in this year's campaign. When we reach out a hand up to one, we influence the condition of all. We are improving people's lives by uniting caring people and mobilizing resources to empower individuals and strengthen communities.

It takes everyone in the community working together to create a brighter future. Together, we can accomplish more than any single group can on its own.

Watch for more information about this year's campaign in the weeks to come. Again, I appreciate your support and I thank you in advance for your gift.

Sincerely,

(CEO Name/Signature)

ENDORSEMENT LETTERS

5.3 Union Campaign Endorsement - Local (Sample)



AFFILIATED WITH THE NORTH EAST AREA LABOR COUNCIL

Duluth AFL-CIO Central Labor Body

Duluth Labor Temple • 2002 London Road • Duluth, MN 55812

(218) 724-1413 (Telephone/Fax)



July 21, 2017

RE: 2017 Minnesota United Way Campaign Endorsement

Dear Union Brothers and Sisters,

Minnesota's unions have been strong and loyal supporter of the annual United Way Campaign. This year marks a new beginning for our over 75 year partnership with United Way on both the national and local levels. Over the past year, AFL-CIO and United Way leaders across the country engaged in conversations about how we can strengthen our relationship and work more closely with community partners to address the root causes of social and economic inequality.

When we support United Way, we're also supporting the work of the AFL-CIO Community Services liaisons across Minnesota. These liaisons work with the United Way and other community partners provide support to union members and families experiencing hardship.

As a board member to the Head of the Lakes United Way, I see where the resources that are donated to our local United Way are used. We have tremendous volunteers and committed staff members who are dedicated to helping our families and workers who may be in need of assistance. Partnerships with organizations such as the United Way really do make a difference in people's lives.

Head of the Lakes United Way's service area encompasses the geographic boundaries of Greater Duluth (Duluth, Hermantown, Proctor, Rice Lake, and the townships of Duluth, Solway, Grand Lake, Fredenberg, Gnesen, Normanna, Canosia, Lakewood, and Midway) as well as the North Shore of Minnesota including Lake and Cook Counties. In 2015, as a result of a merger between the United Ways of Superior-Douglas Country and Greater Duluth, the area expanded to include Superior-Douglas County as well as Ashland and Bayfield counties.

I ask that you join me and support the 2017 United Way campaign. When we all lend a helping hand we are able to lift up many.

In Solidarity,

Beth McCuskey

President Duluth Central Labor Body

LIVE UNITED

ENDORSEMENT LETTERS

5.4 Thank You Letter

Below are two sample thank you letters to acknowledge your campaign supporters in the workplace. Be sure to put the letter on your company letterhead and personalize it whenever possible for greatest impact.

Thank You - Sample 1

Dear (Name):

Congratulations! Your investment to United Way helped all of us at (Company Name) to improve people's lives by uniting caring people and mobilizing resources to empower individuals and strengthen communities.

Your dollars stay local and help our neighbors, friends, family, and co-workers. We envision our community as a place where all thrive. United Way is reaching their goals and accelerating solutions in the following impact areas:

- Basic Needs
- Education
- Health
- Income

Sincerely,

(CEO or ECC)

Thank You - Sample 2

Dear (Name):

Thanks to you, (Company)'s 2017-18 United Way Campaign was an overwhelming success and we achieved our goal of (dollar amount)!

Our community is stronger because of our investment in United Way. We are improving people's lives by uniting caring people and mobilize resources to empower individuals and strengthen communities.

Your dollars stay local and help our neighbors, friends, family, and co-workers. United Way is reaching their goals and accelerating solutions because of us.

Your efforts created incredible enthusiasm for the campaign and ensured our success. Thank you for LIVING UNITED.

Sincerely,

(CEO or ECC)

ENDORSEMENT LETTERS

5.5 Retiree Letter

Below is a sample endorsement letter to promote your campaign in the workplace. Be sure to put this on your company letterhead and personalize it whenever possible for greatest impact.

Dear (Company) Retiree,

(Company Name) is a community leader. That is certainly true of (Company Name) retirees as well. It seems that most every day we see a retiree volunteering and contributing to this region.

Our community is stronger because of our investment in United Way. We are improving people's lives by mobilizing the caring power of our community. Your dollars stay local and help our neighbors, friends, family, and co-workers.

We envision our community as a place where all thrive. United Way is reaching their goals and accelerating solutions in the following impact areas:

- Basic Needs
- Education
- Health
- Income

Please join us in supporting Head of the Lakes United Way during your retirement. Wishing you health and happiness.

Thank you for Living United!

(Retiree Committee Member or CEO)

SPECIAL EVENTS & IDEAS

6.1 Special Events: Overview

The primary purpose of special events is to help create a fun atmosphere during the workplace campaign while raising additional dollars beyond employee pledges. Special events also raise employee morale and camaraderie making for a positive work environment. We want this to be a time of year that people look forward to!

Including one or more special events in your United Way Campaign can help motivate and promote team spirit, raise awareness and money for United Way. Special events provide co-workers with another way to support the campaign while participating in fun activities.

Steve Steele, District Sales Manager at Dr. Pepper-7up, promised to have his head shaved if a certain goal was met. Employees gladly took up the challenge!



Employees at Essentia Health held a region-wide chili feed for all Essentia employees raising over \$3500 for United Way!

LSS Employees in Duluth hold multiple special events during the course of their workplace campaign, including Frozen Turkey Bowling, and duct-taping co-worker, Pete Jonas, to the wall!

SPECIAL EVENTS & IDEAS

6.2 Special Events: Fabulous Food

Serving food over the lunch hour or during a campaign meeting always goes over well. Remember to ask your vendors to sponsor lunch or specific items or do a trade with other local businesses. Package up leftovers after the event is done and sell additional servings for employees to take home for dinner.

Walking Tacos: Serve individual bags of chips with taco meat, cheese, salsa & sour cream, charge per bag of chips purchased.

Hot Dog, Hot Dog, Hot Diggity Dog: Hot dogs or brats, chips and lemonade sold outside the office. Invite customers, employees and other local businesses to partake.

Soup & Laughter: Soup and bread are sold over the lunch hour in the break room along with funny classic tv shows such as Seinfeld or I Love Lucy.

Lotsa-Pasta: Host a pasta bar with 2 different types of pasta & 2 different types of sauces – let the employees create their own lunch, charge by the bowl.

Chili Cook-off: Convert your break room or conference room into a chili test kitchen. Ask employees to provide the chili, and all employees are invited to judge. They can purchase sample cups or buy a bowl of their favorite one. The winner of the office Chili Cook-off could go on to compete in the HLUW annual Chili Cook-Off at the DECC in September!

Ice Cream Sundaes & Root Beer Floats: Sundaes and floats are made & sold to employees, this works well when issued at the end of a meeting or the end of the day.

Baked Potato Bar: Serve baked potatoes along with a variety of toppings.

Tailgate Party: Host a tailgate party before a big game – charge a fee to attend, invite families!

Souper Bowl Party: Challenge your co-workers to a soup contest, do this the Friday before the Super Bowl!

Order Up!: Take orders for lunch for an area restaurant, pick up the food for them but charge a fee for delivery.

Sweet Treat Cart: Sell sweet treats during break times or go around the office door to door and workstation to workstation and sell treats. You can also incorporate flavored coffee items to go with their sweet treat!

SPECIAL EVENTS & IDEAS

6.3 Special Events: Bring on the Competition

Your enthusiasm and creativity make these events really special! If you're looking for new ideas this year, review the following list. Try recruiting some new people to your United Way team. It's a good idea to ask people from different departments, and it's ALWAYS important to have upper-level management, executives and CEO's on board with special events.

Inter-Company Competition: Contact the Employee Campaign Coordinator at another workplace and see if they are willing to engage in a little friendly competition for a good cause! If there is a disparate number of employees, you can use the average gift to determine the victor. Publicity and executive support are key to success. The winning company earns early dismissal, or some other workplace-wide reward.

Intra-Company Competition: Challenge departments or shifts within your company to raise the most donations!

Vikings vs. Packers: Set up two large change containers – one for the Vikings and one for the Packers. At the end of your campaign, whichever team has collected the most money wins a day in their honor. Fans and the CEO dress in team regalia.

Jump Rope Challenge: Jumpers compete in either an individual or team challenge. Entry fee charged for participation. Winners are determined based on total number of jumps within a designated period of time.

Penny Wars: Teams compete to gather the most spare change; pennies are worth positive points and everything else negative points. The winning team receives an incentive!

Bean Bag Tournament: Entry fee charged for single elimination bean bag tournament, play over lunch hour or break times throughout the campaign. Winner receives bragging rights for the year.

Miniature Golf Course & Marshmallow Driving Contest: Turn your office, company grounds or hallways into a miniature golf course. Charge each employee to go through the course. Marshmallow driving contest can complete the course.

Office Olympics: Assign employees to teams for various competitions such as Frisbee throwing, rubber band archery, water relay and paper shoot-out, with points earned.

Candyland Tournament: Like a poker tournament but less complicated & shorter games!

Balloon Pop: Ask employees/area businesses to donate prizes. Put names of prizes inside balloons. Charge employees \$5.00 to buy a balloon and pop it to find out what prize they've won.

Pumpkin Carving or Decorating Contest: Form teams to carve or decorate pumpkins, display in a prominent location, and have people vote for their favorite.

Wii Olympics: Setup a tournament of one-on-one Wii Sport Challenges

SPECIAL EVENTS & IDEAS

Spoon game: Give a plastic spoon to each staff member to keep with them at all times. Each person is given the name of another staff member, this person then tries to find a time that their assigned person does not have their spoon with them. If caught without their spoon they must give their assigned name to the person who caught them. The last person to have their spoon wins!

Scavenger Hunts: Invite employees to participate in a scavenger hunt requiring them to find unusual items from around the neighborhood or office buildings. For a fun twist you could plant items with selected employees for others to discover.

Paper Horse Race: Employees purchase a paper horse, name and decorate it. Each day they receive one draw and the horse moves based on the draw. If an employee didn't like a draw, they could purchase a new draw. Limit redraws to one per day if you would like the game to last longer than a day.

Get Your Goat: Sell time-shares to employees to have something stinky put in someone's office/workspace. That person then pays to have it removed and placed in someone's space.

Guess What?: Sometimes it's not easy to get people to come into the office to participate in a special event. The following are designed for you to email or text your employees so they can still be a part of the fun. This also works well if you have multiple locations!

- **Guessing Game:** Fill a jar with any items you having around the office and people pay a fee to guess – take a photo and email/text to off-site staff.
- **Trivia Contest:** Employees have the opportunity to answer a daily trivia contest, the first one with the correct answer wins!
- **Whose _____ is that?:** Collect photos from employees with a particular subject matter. Have all the employees guess to see if they can match the items with the employee. You can use tattoos, pets, children, baby photos, garden, garage...etc.
- **B-I-N-G-O:** Employees can pay for a bingo sheet – or buy extra if they'd like. Each day you can call out the bingo numbers internally, through email, intranet or by text. The first one with a BINGO wins!

Take a Chance: We're all on time restraints, but don't let that stop you from having a special event during your campaign – they can be quick and fun!

- **Grab Bag Sale:** Fill paper lunch bags with small treats, candy, chips or items your vendors have given the company or any old merchandise you have lying around.
- **PTO (Paid Time Off) Goodie Bags:** Assemble and sell bags of goodies. In each bag, include a slip of paper with a message. Some messages say "Congratulations! You won 4 hours of paid time off," and some messages say "Sorry, you didn't win paid time off. Please play again."
- **Poker Walk:** Employees walk to five stations, all at once or one stop per day, picking up a card at each location. Best poker hand wins.
- **Pick an Egg, Any Egg:** Fill plastic eggs with prizes or cash, charge for the opportunity to play.
- **Duck Pond:** Employees pay a buck to pick a duck. Write the name of the prize on the underside of the duck. If that duck is picked, the player wins that prize.

SPECIAL EVENTS & IDEAS

6.4 Special Events: For Sale

Selling items is a great way for people to donate while still receiving something in return. Remember to have your committee hype up the sale so it can be successful for you, and let us know if we can help – we love being around for special events!

Silent Auction with Bid Numbers: Hold a week-long auction of items donated by local businesses and employees. To participate people purchase a bid number, to provide some anonymity and drive up bids.

Casual Day for United Way: Employees buy the opportunity to wear jeans on a specific day.

Plant Sale: Employees can dig up and donate plants from their garden or yard, or bring in new plants to sell to other employees.

Team Day: Employees pay to wear logo wear to support their favorite team.

Talent Auction: Have employees donate their talents for an auction – handcrafted jewelry, scrapbook services, wood-working projects, homemade meals, desserts or a musical performance.

Candy Grams: Sell candy bars or small items to be delivered internally with a note of thanks.

Flower Sale: Sell flowers by the stem. Charge for interoffice delivery.

Golf Balls “Fore” Sale: Collect old golf balls. After a clean and shine, sell them by the dozen.

Coffee Station: Set up a coffee station and charge for all the extras, (syrops, flavorings, cream, sugar...etc.).

Lunch Box Auctions: Ask different departments/employees to donate lunches to auction off. Use your organizations intercom system, email or other communication systems to auction off the temptations. Prizes can be given out for the most creative, nutritious, humorous or elegant.

Boutique: Have employees bring in items they don't wear/use anymore – purses, scarves and jewelry. Set it up like a boutique & have store hours. All proceeds go to United Way!

Company Cookbook: Ask employees to contribute favorite recipes for a company cookbook which can be compiled and sold.

E-Bingo: Sell Bingo cards for a small fee. Send emails throughout the week with one or two Bingo numbers each time. The first person to get Bingo sends an email to all users. And of course – he or she wins a prize!

SPECIAL EVENTS & IDEAS

6.5 Special Events: Have Fun with Management

Let's face it; people will donate money to see their boss do something silly. This can be a focus of the campaign, used as an incentive if you reach a goal, or a separate special event all on its own.

Pie Toss: For a fee, employees nominate one another to receive a pie in the face. Top four with the most votes receive a pie in their face at a company event.

Bowl with the Boss: Set up a Wii bowling tournament in the office, the winning team gets to go bowling and have Happy Hour with the Boss!

Dunk Tank: Managers volunteer to sit in a dunk tank and employees buy chances to dunk them.

Shave the Boss's Head: If the CEO or President is willing, see if they will have their head shaved if/when a specific goal is reached.

Executive Tricycle Race: Employees can bid to see who they'd like to see race tricycles in the parking lot. Make it even more fun and add obstacles.

Kiss the Pig: Voting with their money, employees vote which executive staff will have to kiss a pig.

Put Your Best Shoe Forward: Line up senior managers and/or other employees for some unique mug shots - shoes only! Hold a contest before your campaign kicks off to see if employees can figure out who's who.

Where in the County is Your CEO: Have the company CEO or President visit five different United Way agencies and get their picture taken doing something at the agency. When taking the picture, be sure not to have the agency name showing (can show part of the agency name as a clue if needed). Post one photo each day with clues as to where the CEO/President is. Employees will guess where their CEO/President is. All correct answers are entered into a drawing.

Engage Your Customers: If you have a high-traffic place of business, or work in an area that is easily accessible to people, don't forget to engage your customers. Sometimes clients appreciate knowing how other companies are supporting the United Way.

10% of Sales: Do you operate or work closely with a local eating establishment? If so, designate a day where 10% of the sales go to United Way. Up the ante by having your CEO work at the restaurant for the day (or over the lunch period) and promote it throughout the office.

Garage/Sidewalk Sale: Ask employees to bring in gently used items to be sold at your location. Promote the sale both internally and to the general public.

Pay to Park: Charge people to park in your parking lot during a concert or a big game; donate the proceeds to United Way.

SPECIAL EVENTS & IDEAS

6.6 Special Events: Other Great “Fun”draising Events

Bake Sales: Have employees bring in home-made treats and sell them in your office or building

Basket Auctions: Each department can pick a theme (movie night, a day at the beach, golf outing, birthday party) and donate items to fill the baskets, which are auctioned off to the highest bidder

Animal Races: hamsters, turtles, minnows, etc. (No animals are to be harmed in the making of this event)

Book/Movie/Game Sale: We all have a stash of books, movies and/or games that are sitting in a pile on the floor – make use of them!

***Buy a Key for a Locked Box:** Fill with a prize and sell keys to benefit United Way – only one will open the box!

Game Shows: As demonstrated at this year’s ECC training, games are a great way to get people involved! Head of the Lakes United Way has games that you can check out for use at your workplace. Contact us for details!

- “Let’s Make a Donor!” (Let’s Make a Deal)
- *”Punch-A-Bunch” (HLUW’s game has 20 cups for prizes, and is customizable with a whiteboard finish – make it your own theme/game!)
- “Who Wants to be a Millionaire?”
- The Dice Game (players try to guess the numbers in a statistic from one of HLUW’s Partner Agencies)
- Jeopardy
- Wheel of Fortune

Boss is Full of Hot Air: Sell balloons to fill up the boss’s office

Wine/Beer tasting: May require an off-site venue!

Sleep in Late Cards: Purchase cards to come in a ½ hour, 1 hour, or 2 hours late without using PTO!

Group Wellness: If your workplace is participating in a wellness program, you can incorporate it into the United Way campaign. Collect pledges for every 1000 steps taken, or have management pledge a bonus United Way donation if employees meet certain wellness goals

**Sign up to borrow these games from Head of the Lakes United Way for use during your campaign.*

SPECIAL EVENTS & IDEAS

6.7 HLUW Awards and Recognition Opportunities

Your organization's support of the annual United Way community giving campaign is critical to our joined success and your investment produces positive community results.

To recognize our supporters, we have established several recognition opportunities. Please consider striving for one of these awards as part of your overall workplace campaign effort. Awards are presented each year at our annual LIVE UNITED Luncheon in May.

Best in Show: Top 10 Recognition for Total Dollars Raised

- Large Organization – (101+Employees)
- Medium Organization – (26-100 Employees)
- Small Organization – (2-25 Employees)

Best in Fundraising: Top 10 Recognition for largest INCREASE in Total Dollars Raised

- Large Organization – (101+Employees)
- Medium Organization – (26-100 Employees)
- Small Organization – (2-25 Employees)

Best in Employee Participation: Recognition for all organizations with 75% or greater employee participation

Best in Engagement: Recognition for all organizations engaging with United Way in four (4) or more areas:

- Employee Workplace Campaign
- Organizational (Corporate) Gift
- Special Events (Held on behalf of HLUW)
- Sponsorship (Monetary or In-Kind)
- Leadership Giving
- Volunteer



Left: HLUW Board members Cindy Theien and Dr. Lisa Erwin present the LIVE UNITED award to Barb Lucia. Right: Breanne Marie and the Front Porch Sinners are introduced by Matt Hunter, HLUW President, at the 2017 LIVE UNITED Luncheon.

WRAPPING UP THE CAMPAIGN

7.1 Reporting Results: Campaign Spreadsheet (template)

New this year, we have developed a tool for ECCs to use to track the results of their workplace in MS Excel. This is an OPTIONAL spreadsheet for ECCs and/or their HR/Payroll department to use to track workplace campaign pledges.

To access the spreadsheet, please visit www.hlunitedway.org. Below is the list of instructions included with the spreadsheet and a same view of the template.



Head of the Lakes
United Way

2017-18 Annual Workplace Campaign

Please complete the following steps to ensure your totals are recorded accurately.

- 1 Complete the top portion (all RED fields) of the spreadsheet including organization name, contact information for the person completing the spreadsheet, total # of employees, total # of donors, and the date that payroll pledges begin for the 2017-18 campaign.
- 2 List each donor. Last name, first name, email, preferred phone/type.
- 3 Enter the amount of the donor's gift in the appropriate column.
- 4 If adding extra rows to accommodate more donors, make sure the summation formula includes the additional donors. You may need to set the formula again. You will also need to re-number your donors.
- 5 A geographic area must be selected for each donor's gift (column G). If a donor wishes to split their gift between 2 or more areas, please add their name on multiple lines as needed and split the total gift amount per the donor's instructions.
- 6 Please PRINT the completed spreadsheet and include it in the final campaign envelope with the original HLUW employee pledge forms. The totals on the spreadsheet should match the front of the campaign envelope. Additionally, please EMAIL a copy of the spreadsheet to finance@hlunitedway.org with "Company Name 2017-18 Campaign Spreadsheet" in the subject line.

If you have any questions, please use the email address above or contact Jeanette in pledge processing at 218-726-4868.

Thank you for all your hard work running a successful United Way campaign!

Organization Name: _____

ABC Company

Form Completed By (name): Sally Sample **Phone #** (218) 722-1234

See Spreadsheet Instructions Tab for information on completing and submitting this form.

| | |
|--|----------|
| Total Number of Employees at your Company: | 15 |
| Total Number of Donors: | 4 |
| Date Payroll Deductions for 2017-18 Campaign will begin: | 1/1/2018 |

Most companies start on January 1st

For Payroll Deductions - Please make copies of employee pledge forms for your HR Department

2017-18 EMPLOYEE PLEDGES

| Donor # | LAST NAME | FIRST NAME | Donor Email Address | Donor Preferred Phone | Donor Phone Type | Geographic Area for Donation | Total Annual Payroll Gift | Total Cash Gift | Total Check Gift | Online Pledge Total | Total To Be Billed | Credit Card Total Gift | Stock Gift | Employee Annual Campaign Total Gift |
|--------------------------------------|-----------|------------|--|-----------------------|------------------|------------------------------|---------------------------|-----------------|------------------|---------------------|--------------------|------------------------|------------|-------------------------------------|
| 1 | Living | United | 1donor@address.com | (218) 722-2345 | Work | Greater Duluth | 120.00 | | | | | | | 120.00 |
| 2 | Giving | Everyday | 2donor@address.com | (218) 722-3456 | Work | Superior-Douglas County | | | 25.00 | | | | | 25.00 |
| 3 | Generous | Donor | 3donor@address.com | (218) 390-4567 | Cell | Greater Duluth | 1,200.00 | | | | | | | 1,200.00 |
| 4 | Thankful | Supporter | 4donor@home.com | (218) 626-1234 | Home | North Shore of MN | | | | | 60.00 | | | 60.00 |
| 5 | | | | | | | | | | | | | | - |
| 6 | | | | | | | | | | | | | | - |
| 7 | | | | | | | | | | | | | | - |
| 8 | | | | | | | | | | | | | | - |
| 9 | | | | | | | | | | | | | | - |
| 10 | | | | | | | | | | | | | | - |
| 11 | | | | | | | | | | | | | | - |
| 12 | | | | | | | | | | | | | | - |
| 13 | | | | | | | | | | | | | | - |
| 14 | | | | | | | | | | | | | | - |
| 15 | | | | | | | | | | | | | | - |
| 16 | | | | | | | | | | | | | | - |
| 17 | | | | | | | | | | | | | | - |
| 18 | | | | | | | | | | | | | | - |
| 19 | | | | | | | | | | | | | | - |
| Employee Total Gifts= Total A | | | | | | | | | | | | | | 1,405.00 |
| Pledge Type totals = | | | | | | | | | | | | | | 1,320.00 |
| Total B | | | | | | | | | | | | | | 1,405.00 |

TOTALS by Pledge Type

Total A should equal Total B. Use this amount for your Company's total employee dollars raised.

WRAPPING UP THE CAMPAIGN

7.2 HLUW Campaign Forms

7.2.1 Individual Pledge Form

Please make sure that all donors in your workplace have completed their pledge form as indicated below:

PERFORM THE 4 CHECKS ON EACH PLEDGE FORM:

1. Check for **complete contact information** for each donor including phone or email in case we need to verify information about their pledge.
2. **Preferred Geographic Area has been selected:** with our expanded service area, it is very important to us that gifts are used in the region the donor intends. If a region is not selected, we will contact the donor to verify which region they prefer.
3. The donor has indicated their **Total ANNUAL Contribution (Pledge).**
4. Pledge form is **signed and dated** by donor. All pledge forms must include signatures to be processed.

HEAD OF THE LAKES UNITED WAY PLEDGE FORM

424 W. Superior Street, Suite 402 | Duluth, MN 55802
Duluth: 218-726-4770 | Superior: 715-394-2733 | www.hluw.org

STEP 1 DONOR INFORMATION: Check here if your contact info has recently changed.

Prefix _____ First Name _____ MI _____ Last Name _____ Suffix _____
Home Address _____ City _____ State _____ Zip _____
 I am Retired. Employer _____ I am a Union Member of: _____

Please provide your preferred phone number and email address so that we may contact you if we have questions regarding your pledge.

Phone: _____ Call Home Call Work Alt Phone _____ Cell Home Cell Work Personal Work
Email: _____

STEP 2 CHOOSE YOUR GEOGRAPHIC AREA*:
 Ashland – Bayfield Greater Duluth North Shore Superior – Douglas County

STEP 3 MAKE YOUR PLEDGE: **TOTAL Annual Contribution:** \$ _____ Indicate payment method below.

PAYROLL DEDUCTION
I want to donate the following amount per pay period:
 \$50 \$25 \$10 \$5
 Other amount \$ _____
My pay period is:
 Weekly (52 per year)
 Twice a month (24 per year)
 Every other week (26 per year)
 Other _____

BILL ME
Please send me an invoice:
\$ _____ (\$25 minimum)
 Quarterly One Time on: _____ mm/yy

DIRECT GIFT
 Cash \$ _____
 Check \$ _____
Check # _____
Date _____
Make checks payable to: United Way

CREDIT CARD
One-time or recurring CC charge
 My credit card form is attached*
 I'll give securely online at: www.hluw.org/give
 Please contact me
*Credit card forms and additional information about online giving can be found at www.hluw.org/give.

LAKE SUPERIOR LEADERSHIP SOCIETY
An individual or combined gift of \$1,000 or more qualifies you as a Lake Superior Leadership Society Member! In addition, the Emerging Leaders program recognizes donors that give \$500 with a commitment of increasing their gift to \$1,000 within 3 years.
 Combined Gift with _____ Employer _____

RECOGNITION: Please use this as my/our names in United Way publications I/We wish to remain anonymous.

STEP 4 Signature _____ Date: _____

ADDITIONAL INFO: (OPTIONAL)
AGE RANGE: 18-24 25-34 35-44
 45-54 55-64 65-74 75 & older
 I am a NEW HIRE. I plan to RETIRE _____ mm/yy

Please contact me regarding PLANNED GIVING.
 PLEASE ADD ME TO THE HLUW EMAIL LIST:
 General Head of the Lakes UW e-news
 Volunteer Opportunities

DESIGNATIONS: If you would like to designate your gift, visit WWW.HLUWEDWAY.ORG/GIVE to view our current partner agencies and fill out/print a designation form. A completed designation form must be attached to your pledge form to be honored.

Thank you for your contribution to the United Way campaign. No compensation, goods or services have been given to the donor from Head of the Lakes United Way in return for this contribution. If HLUW has any questions about your contribution, you will be contacted at the above phone number/email address. *Geographic Area: If no area is selected, we will apply your gift to the geographic area corresponding to your provided zip code.

Original: United Way | Duplicate Copy: Donor/Payroll Dept

THANK YOU FOR YOUR SUPPORT!

7.2.2 Donor Designation Form

Donors wishing to designate their gift to one of our current agency partners must complete and attach a HLUW Designation Form to their pledge form. Copies are available to print on our website at www.hlunitedway.org/give.

HEAD OF THE LAKES UNITED WAY
DESIGNATION FORM

424 W. Superior Street, Suite 402 | Duluth, MN 55802
 Duluth: 218-726-4770 | Superior: 715-394-2733 | www.hlunitedway.org

Head of the Lakes
United Way

STEP 1 DONOR INFORMATION: PLEASE NOTE: To ensure the largest impact, making an UNDESIGNATED gift allows your entire gift to be used in the COMMUNITY CARE FUND in the geographic area of your provided zip code.

Prefix _____ First Name _____ MI _____ Last Name _____ Suffix _____
 Home Address _____ City _____ State _____ Zip _____
 Email _____ Phone _____

STEP 2 GEOGRAPHIC AREA (from pledge form)

2 Please select the geographic area **FOR YOUR GIFT** in Step 2 on your **PLEDGE FORM**. If no geographic area is selected, your gift will be used in the area corresponding with the provided zip code.

COMMUNITY CARE WITH EXCEPTION/S (optional)
 If you do not want your gift to support a specific partner agency, Please list them here.
 Designate to ALL HLUW Partner Agencies EXCEPT:

STEP 3 DESIGNATION OPTIONS:

Designate your gift to a group of HLUW Partner Agencies within a specific **Impact Area**.

\$ _____ **Impact Area:** Basic Needs Education Health Income

OR Designate to one or more eligible **HLUW Partner Agencies** (view list at www.hlunitedway.org/give):

\$ _____ **UW Partner Agency:** _____
 \$ _____ **UW Partner Agency:** _____

OR Designate to another United Way:

\$ _____ **Other United Way:** _____

\$ _____ **TOTAL ALL DESIGNATIONS** \$ _____ **ANNUAL GIFT TOTAL**

STEP 4 Required Signature _____ Date: _____

STEP 5 **YES!** You may release my name and address to the designated agency or United Way for an acknowledgment.
 NO! Do NOT release my name and address.

If HLUW has any questions about your designation, you will be contacted at the above phone number/ email address. Designations to 501(c)3 non-profit organizations that are not currently funded Partner Agencies of Head of the Lakes United Way cannot be honored. Designations will be subject to an 11% processing fee. No compensation, goods or services have been given to the donor from Head of the Lakes United Way in return for this contribution.

7.2.3 Credit Card Form

In order to maintain the confidentiality of our donors and keep their information private, we have updated our pledge forms. If a donor wishes to use a credit card to make a donation, they are asked to complete a credit card transaction form and attached it to their pledge form. We will process the credit card as indicated and then destroy the credit card form. Alternatively, donors may go online to www.hlunitedway.org/give to set up a one-time or recurring donation on our secure online giving portal.

Head of the Lakes
United Way

Credit Card Transaction Information
 Head of the Lakes United Way
CONFIDENTIAL

Geographic Area: Ashland – Bayfield Greater Duluth North Shore Superior-Douglas County

Name on Credit Card: _____ Company: _____

Credit Card Billing Address: _____ Billing Zip Code: _____

Phone #: _____ Email: _____

Credit Card Type: VISA _____ MasterCard _____ American Express _____ Discover _____

Credit Card #: _____ Expiration Date: _____ Security Code: _____
(mm/yyyy) (3-4 digits on back of card)

Amount: \$ _____ Reason for Transaction: _____

Comments: _____

Office Use Only Date Received: _____ Form completed by: _____
 Date Processed: _____ CC Charge processed by: _____

7.2.4 Organization Pledge Card

Organizations wishing to make a “corporate” or company gift at the management or organizational level should complete and include this form in the final campaign envelope:

| | | | | | |
|----------------------|--|-------------------|---|--|---|
| ORG PLEDGE CARD | COMPANY/ORG NAME _____ | | LIVE UNITED | | |
| | CONTACT NAME _____ | | United Way  | | |
| | ADDRESS _____ | | | | |
| | CITY _____ | STATE _____ | ZIP _____ | | |
| | PHONE _____ | EMAIL _____ | | | |
| | CHOOSE GEOGRAPHIC AREA/S FOR COMPANY GIFT (Indicate dollar amount OR percentage per area if applicable). | | \$ _____ | TOTAL ANNUAL PLEDGE | <input type="checkbox"/> PAYMENT ENCLOSED |
| | <input type="checkbox"/> ASHLAND-BAYFIELD _____ \$/% | — | \$ _____ | PAYMENT ENCLOSED | <input type="checkbox"/> MONTHLY |
| | <input type="checkbox"/> GREATER DULUTH _____ \$/% | — | \$ _____ | TOTAL AMT DUE | <input type="checkbox"/> QUARTERLY |
| | <input type="checkbox"/> NORTH SHORE _____ \$/% | = | \$ _____ | | <input type="checkbox"/> ANNUALLY |
| | <input type="checkbox"/> SUPERIOR-DOUGLAS CNTY _____ \$/% | | | | BEGINNING: _____ MM/YY |
| AUTH SIGNATURE _____ | | DATE _____ | | | |
| | | THANK YOU! | | Head of the Lakes United Way 424 West Superior St. 4-402 Duluth, MN 55802 Duluth: 218-726-4770 Superior: 715-394-2733 www.hlunitedway.org Make checks payable to United Way. No goods or service fees been provided for contributions received. PRINTED IN HOUSE | |

Please note, all of our forms can be found on our website, along with all of the resources mentioned in this guidebook.

Please visit our website at hlunitedway.org

You may also contact us at **(218) 726-4770** if you have any questions. Individual staff member contact information can be found on page 5 of this book. We are happy to help!

7.2.5 Campaign Summary Envelope

Head of the Lakes United Way
CAMPAIGN REPORT ENVELOPE

To ensure accuracy, please complete this form as completely as possible.



424 West Superior St. #402
 Duluth, MN 55802
 Duluth: 218-726-4770
 Superior: 715-394-2733
 www.hlunitedway.org

THIS REPORT IS: PARTIAL FINAL

Enclosed in this envelope:

- United Way pledge forms - 1 per donor. Cash, checks, credit card forms and/or designation forms are attached as needed. (Go to www.hlunitedway.org/give to print additional forms.)
- Company/organization pledge card, signed, with pledge indicated and/or donation enclosed.
- Completed "Workplace Campaign Survey" with corrections and updates indicated.

ASHLAND-BAYFIELD GREATER DULUTH NORTH SHORE SUPERIOR-DOUGLAS COUNTY

STEP 1. COMPANY INFORMATION

PLACE ADDRESS LABEL HERE (OPTIONAL)

Organization name: _____ # Employees: _____
 Envelope completed by: _____ Date: _____
 Email: _____ Phone: _____

STEP 2. LEADERSHIP SOCIETY DONATION INFORMATION

Please check if there are Lake Superior Leadership Society pledges enclosed (\$1,000 or more). Include these numbers in the employee contribution summary section.

Number of Leadership Donors: _____ Leadership Dollar Amount: \$ _____

STEP 3. PAYMENT SCHEDULE

Payment for the Company/Organization Gift begins _____ and will be paid:
 Monthly Quarterly Semi-annually One-time

Payment for the Employee Payroll Deduction begins _____ and will be paid:
 Monthly Quarterly Semi-annually One-time

STEP 4. CONTRIBUTION SUMMARY

| | AMOUNT PLEDGED | AMOUNT ENCLOSED |
|---|----------------|-----------------|
| A. COMPANY/ORGANIZATION GIFT | \$ | \$ |
| B. WORKPLACE SPECIAL EVENTS CASH: \$ _____ CHECK: \$ _____ | \$ | \$ |

| EMPLOYEE CONTRIBUTIONS (With pledge cards enclosed) | NUMBER OF DONORS | AMOUNT PLEDGED | AMOUNT ENCLOSED |
|---|------------------|----------------|-----------------|
| Cash | | \$ | \$ |
| Check | | \$ | \$ |
| Payroll Deduction | | \$ | |
| Direct Bill/Securities | | \$ | \$ |
| Credit Card | | \$ | \$ |
| Online Giving | | \$ | \$ |
| C. TOTAL EMPLOYEE GIFTS | | \$ | \$ |

| | | | |
|-------------------------|--|----|----|
| TOTAL ALL GIFTS (A+B+C) | | \$ | \$ |
|-------------------------|--|----|----|

Before submitting this envelope:

- Check ALL pledge forms for:
 STEP 1. Complete donor contact information
 STEP 2. Preferred Geographic Area indicated
 STEP 3. Total annual pledge
 STEP 4. Pledge form signed and dated
- If payment method is "credit card," verify that a credit card form is filled out correctly and attached to the pledge form.
- Verify that all checks are made out to *United Way*.
- For Payroll Deduction, give a copy of the completed pledge form to your payroll dept.
- Complete the total number of donors and dollars for each category.
- Verify the total number of people employed by your organization.

FOR UNITED WAY USE ONLY

| | |
|--------------------|--|
| Auditor's Initials | |
| Date | |
| Cash | |
| Checks | |
| Payroll | |
| To be billed | |
| Credit Card/Online | |
| Stocks/Securities | |
| TOTAL | |

| | |
|--------------------|--|
| Cashier's Initials | |
| Date | |
| Cash | |
| Checks | |
| Payroll | |
| To be billed | |
| Credit Card/Online | |
| Stocks/Securities | |
| TOTAL | |

| | | |
|-------------------|------|------|
| Entered by Initl. | | |
| Processed Date | | |
| Andar Env # | ABC# | GDC# |
| | NSC# | SDC# |
| Cmpn Adt Pg # | | |

Please complete ALL sections!

WRAPPING UP THE CAMPAIGN

7.3 Saying THANK YOU

After the conclusion of the campaign, it is very important to thank all of the employees who helped make your campaign a success. People want to feel appreciated when they have done something positive. Here are some suggested ways to thank your participating co-workers.

United Way Merchandise

Give t-shirts, pens or note pads with the United Way logo on them. Create your own or order items from United Way online store at UnitedWaystore.org.

Live United Luncheon

Purchase tickets for your staff to attend HLUW's annual celebration luncheon held every spring highlighting the impact of United Way in the community.

Scooping Up Success

An ice cream social is a great way to celebrate a successful campaign. Have the management team scoop up the ice cream and personally thank each employee.

Waffle/Pancake Breakfast

Have management serve up breakfast for everyone who contributed.

Barbecue or Pizza Party

Invite employees to a company-wide lunch. Have executives cook or serve.

LIVE UNITED Balloons or Flowers

Surprise each contributor on the last day of the campaign. Place a balloon or flower at each donor's desk.

LIVE UNITED Thank You Sack Lunch

Order LIVE UNITED sack lunches for every contributor. Include a thank you note from your CEO or include thank you drawings or letters from children served by a United Way member nonprofit organization.

Candy Gram

Distribute candy bars to each participant with a thank you message attached.

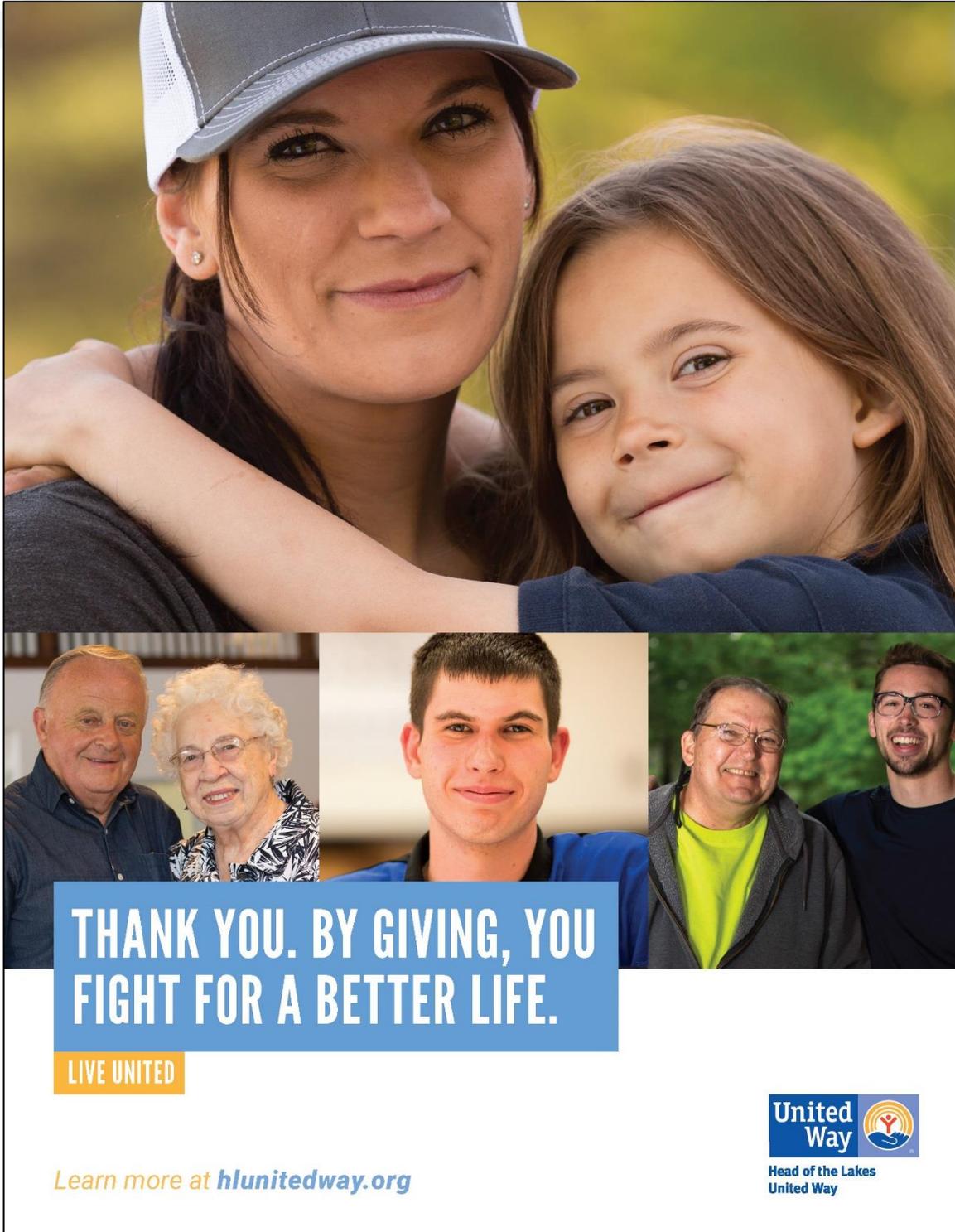
Chip in for United Way

Place chocolate chip cookies on every contributor's desk with a note thanking each one for chipping in for United Way.

WRAPPING UP THE CAMPAIGN

7.3.1 Thank You Poster

Print out copies of this poster from our website and post in your common areas.



**THANK YOU. BY GIVING, YOU
FIGHT FOR A BETTER LIFE.**

LIVE UNITED

Learn more at hlunitedway.org

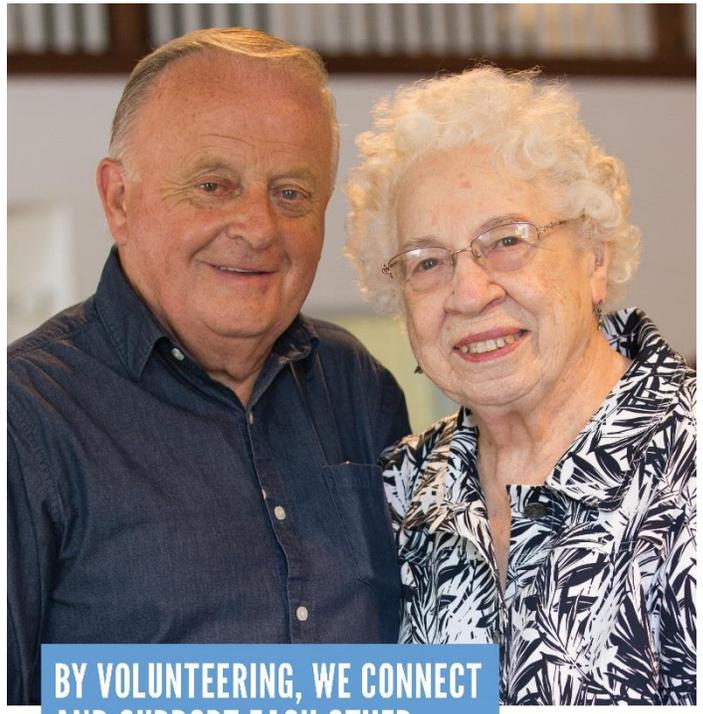




WHEN WE BOND TOGETHER, WE CAN IMPROVE SOMEONE'S LIFE.

LIVE UNITED

John met young Michael after finding that his love of bicycling would change due to an ALS diagnosis. The Courage Kenny Rehabilitation Institute-Northland, funded in part by the United Way, allowed John to continue bicycling and to share his active life experiences with Michael. [Learn more about John at hlimitedway.org/stories](https://hlimitedway.org/stories)



BY VOLUNTEERING, WE CONNECT AND SUPPORT EACH OTHER.

LIVE UNITED

Serving others is what Jerry is all about. After a 30 plus year career as a Lake County executive, he retired and spends many of his days volunteering through the Community Partners program in Two Harbors. He helps friends, like Frances, with transportation and errands everyday. [Learn more about Jerry at hlimitedway.org/stories](https://hlimitedway.org/stories)



WITH SUPPORT, WE CAN HOLD EACH OTHER UP.

LIVE UNITED

As a child, Dakota went through a range of struggles by not having a father in his life. The Mentor Superior Program, aligned him with Peter, who Dakota now calls his grandfather. Peter's support helped Dakota earn his GED through the Challenge Academy and allowed him to graduate with his classmates. [Learn more about Dakota at hlimitedway.org/stories](https://hlimitedway.org/stories)



FINDING PURPOSE PROVIDES HOPE FOR THE FUTURE.

LIVE UNITED

Krystal has made significant changes to her life since working with United Way partner, the Salvation Army, and the Family Transitional Housing program. She has created a stable environment for herself, found meaningful work, and continues to fight for her daughter and their future every day. [Learn more about Krystal at hlimitedway.org/stories](https://hlimitedway.org/stories)

