STRENGTH IN NUMBERS

LIVE UNITED®

Head of the Lakes United Way

Employee Campaign Coordinator

ECC Guidebook

2019-2020

United Way

Head of the Lakes
United Way

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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 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. The Duluth "hub" serves residents in 42 counties in Minnesota as well as Douglas County in NW Wisconsin. For additional information, call Rory Strange at 218-726-4777.

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 Matt Hunter at 218-726-4770.

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 call 218-726-4775.

United Way Volunteer Center: United Way's Volunteer Center connects workplaces and individuals with volunteer opportunities at over 80 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 Dave Nonnemacher at 218-726-4889 or visit www.volunteerhluw.org

INTRODUCTION TO
HEAD OF THE LAKES UNITED WAY

1.2 Contacts – Staff and 2019-20 Board

Duluth Office
424 West Superior Street
Suite 402
Duluth, MN 55802
Phone: 218-726-4770
Fax: 218-726-4778

Superior Office
1507 Tower Avenue
Suite 333
Superior, WI 54880
Phone: 715-394-2733

United Way 2-1-1 Information & Referral
Dial 2-1-1
E-mail: **211@hlunitedway.org**

Head of the Lakes United Way Staff

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INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

2019 HLUW Board of Directors

OFFICERS:

Cindy Theien, Chair
National Bank of Commerce

Kalee Hermanson, Vice Chair
Holden Insurance Agency

Eric Siljendahl, Secretary
US Bank

Steve Morris, Treasurer
Allete, Inc.

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

Mark Britton
UnitedHealthcare

Amy Hallback
maurices

Tricia Hobbs
Thrivent Financial

Joan Jeanetta
Essentia Health

Phil Jents
City of Duluth

Kathryn Koch
ALLETE, Inc.

Annie Lepper
MPECU

Dusty Letica
St. Louis County Public Health & Human Services

Beth McCuskey
Duluth Central Labor Body

Steve Morris
ALLETE, Inc.

Lisa Neitzel
Surge Communications

Janet Nelson
AFSCME – Retired

Jill Pinkney Pastrana
University of MN - Duluth

Jen Patterson
Century 21 Atwood & Gilderman

Mary Anderson-Petroske
Superior High School

Neal Ronquist
Duluth Media Group

Mark Sitek
Enbridge Energy – Retired

Scott Studden
St. Luke's Hospital

INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.3 HLUW Programs: 2-1-1 Information & Referral

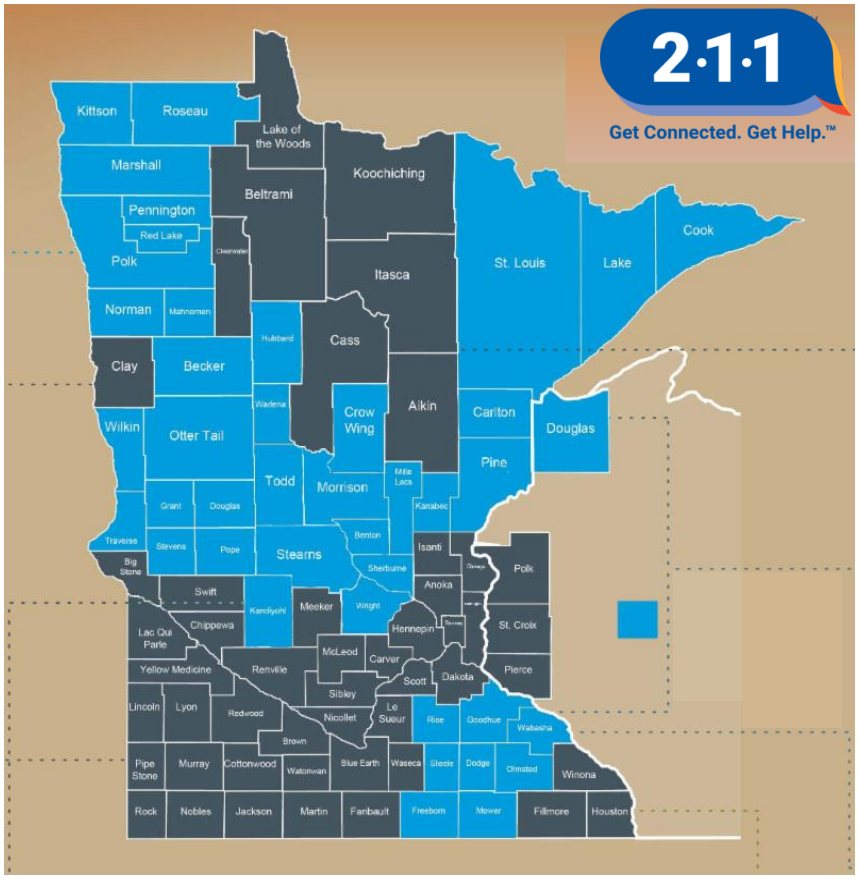
2-1-1 is an information and referral service which is an internal program of United Way. Call 2-1-1 to speak to a specialist who will help you locate services in your area. All phone calls are free and confidential.

We all can use a little help sometimes. That's why caring people are ready to lend a helping hand--just when you need it most. Locating the best source of assistance by calling 2-1-1 is a fast, free, confidential way to get help, 24 hours a day, 7 days a week. When you call, you'll talk to a trained specialist who will assist in finding the right information for you.

Information connection for:

- Homelessness/Housing Issues
- Financial Difficulty
- Crisis Situations
- Legal Concerns
- Education
- Mental Health
- Discrimination
- Health Care Concerns
- Domestic Violence/Abuse
- Child Care
- Employment Assistance
- Basic Needs - Food/Shelter
- Youth Services
- Senior Services
- Veteran/Military Members
- and much more...

Get Help. Call 2-1-1.
Email: 211@hlunitedway.org



United Way 2-1-1 serves 42 counties and calls are answered 24/7 year round.

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.

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 Nonprofit Partners

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

www.volunteerhluw.org

Our website is your one-stop shop for volunteer opportunities in the Twin Ports area! It features opportunities from over 80 partners. 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 twice per year. Volunteers from area companies and organizations come out to make a difference by volunteering to serve at local non-profit agencies to tackle one-time projects. Many projects and donation drives are completed through these awesome events!

INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.5.1 Emerging Leaders

About Emerging Leaders

Head of the Lakes United Way (HLUW) Emerging Leaders Board Training program is for individuals who are interested in serving on nonprofit boards in the Twin Ports. It's an exciting opportunity for professionals to leverage their leadership skills through volunteerism and gain an understanding of what it takes to become successful board members.

Members of the Boys & Girls Club – Goldberg Branch prepared and served dinner to Emerging Leaders participants

Benefits

- Complete a Board service training program that will equip you with skills to be successful on a non-profit board
- 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

"It was impactful to hear from our speakers how passionate they are about the organization they represent as a board member. It was refreshing to be in a group of people who are so passionate and excited to do good in their communities."

~ 2019 Emerging Leaders Graduate

"Excellent program- a great resource and opportunity!"

~ 2019 Emerging Leaders Graduate

2019 Emerging Leaders Board Training Program Graduates

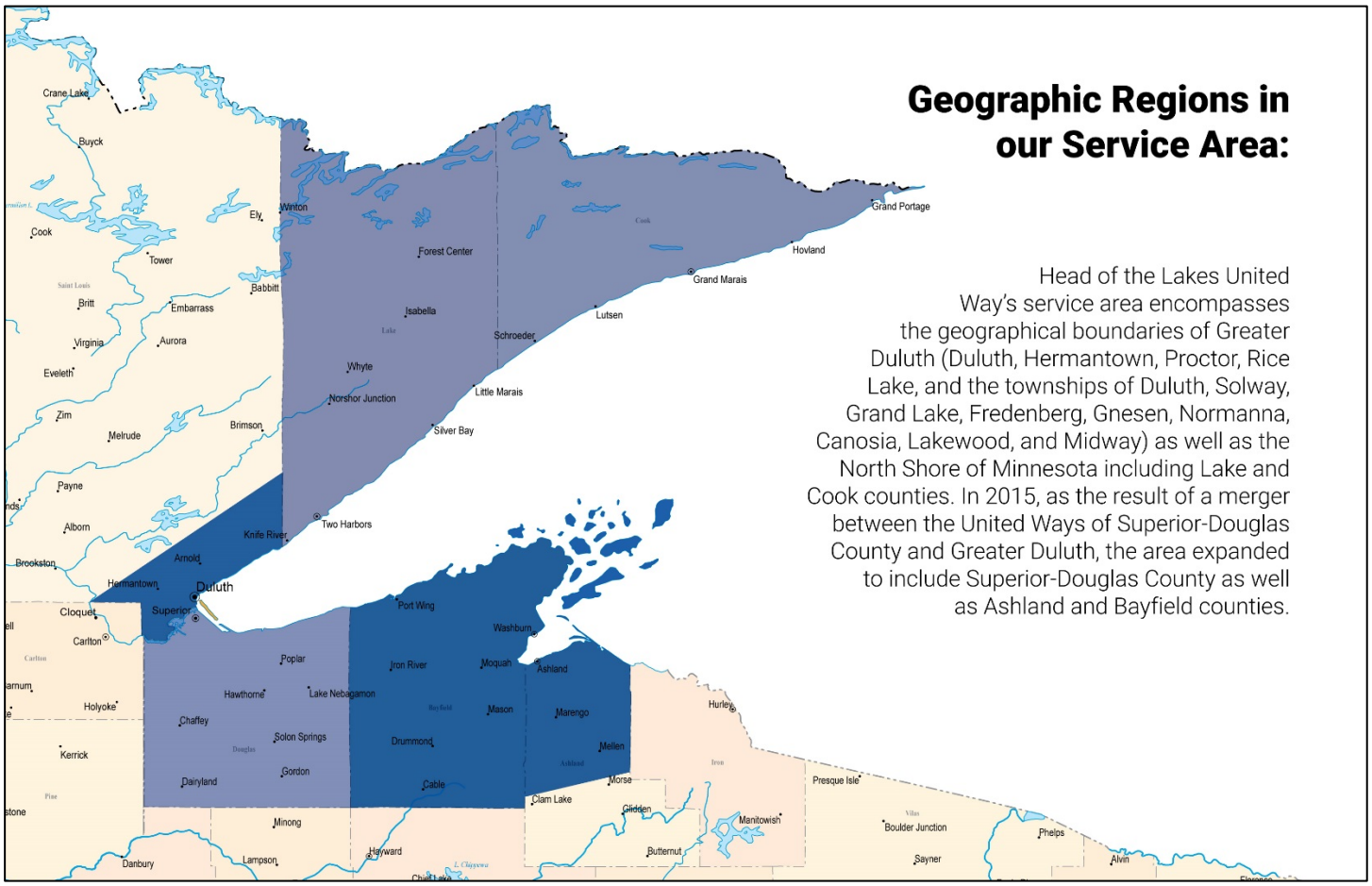
INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

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**
Outcome: **Early Childhood Education: Increase early learners' ability to succeed in school and read well by Grade 3.** 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. Outcome: **Youth Achievement: Increase youth access to and engagement in high-quality programming which promotes academic achievement.** 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.	Outcome: **Increase income** 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. Outcome: **Gain and sustain savings and assets** In addition to increasing income, building savings and assets is vital for the financial stability of lower-income people.
HEALTH **Improving People's Health**	**BASIC HUMAN SERVICES** **Ensuring a Strong Network of Basic Human Services**
Outcome: **Increase access to physical, mental and dental services and benefits for uninsured and under-insured people** 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. Outcome: **Increase access to activities that promote healthy behaviors and wellness.** Focus areas include: - Nutrition & Access to Healthy Food - Obesity Prevention & Active Living	Outcome: **Meet people's emergency and transitional need for food, shelter, housing, safety and clothing** 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.

INTRODUCTION TO HEAD OF THE LAKES UNITED WAY

1.7 Regional Service Area Map



INTRODUCTION TO
HEAD OF THE LAKES UNITED WAY

1.8 Save the Date! HLUW 2019-20 Events Calendar

Stuff The Bus School Supply Drive (Superior-Douglas County & North Shore Area)
August 1-23, 2019
Select organizations 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.

28th Annual United Way Chili Cook-Off
Thursday, September 19, 2019, 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.

Day of Caring – Holiday Edition
December 4, 2019
United Way's Day of Caring (Holiday Edition) matches teams of volunteers with local non-profit agencies in need of some extra helping hands.

Emerging Leaders Board Training
March 3–April 7, 2020
This program is an opportunity for individuals to leverage their leadership skills through volunteerism and board engagement in six, 2-hr sessions.

Bike Swap
April, 2020 Continental Ski and Bike
Join us for the 13th 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!

National Association of Letter Carriers' Stamp Out Hunger® Food Drive
Saturday, May 9, 2020
Participate in the largest one-day food drive in America! Simply place non-perishable food items by your mailbox by 9:00 am on 5/9/20. All food collected stays local.

HLUW "LIVE UNITED" Luncheon
Wednesday, May 13, 2020
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!

Duluth Building and Construction Trades Golf Scramble
Saturday, June 13, 2020
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 17, 2020
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!

United Way at the Wade
August, 2020
The Duluth Huskies and United Way are pairing up for the 2nd Annual United Way at the Wade event! Stay tuned for additional information!

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

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 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

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.

Consider participating in HLUW events year-round (United Way at the Wade, Chili Cook-Off, Day of Caring, Live United Luncheon, and more). These events are fantastic opportunities to learn more about United Way in a fun, engaging way!

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 6 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!

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. **Organizational (Corporate) Gift**
   Contribute a monetary gift at the corporate or organizational level.

3. **Special Events (Held on behalf of HLUW)**
   - Organize 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, bowling events, etc.

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. Or, contact Matt Hunter or Taire Lind Suliin at 218-726-4770.

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 32).

6. **Volunteer**
   Take part in Volunteer Opportunities with United Way:
   - Head of the Lakes United Way's Volunteer Center events such as Day(s) of Caring
   - Organize an on-site speed volunteering project at your workplace. For ideas, visit volunteerhluw.org and view/download a packet of "Speed Volunteering Projects"
   - HLUW Board member or Committee member
   - Community Investment panelist

2.3 Employee Campaign Coordinator Timeline/Checklist

4-5 weeks before the campaign

- ☐ Meet with your CEO
- ☐ Talk with previous ECC
- ☐ 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 coordinator

Year round:

Your United Way contact can help you

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

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: _____

6 Communicate & Publicize the Campaign

- Email and personalize 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!)

List methods we will use: _____

_____

_____

7 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)

Our plan to thank donors and employees: _____

_____

8 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 and signed their pledge form
- 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 conversations 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.***

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.

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 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 (prize 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

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 welcome 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
- 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

GETTING STARTED

2.9 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

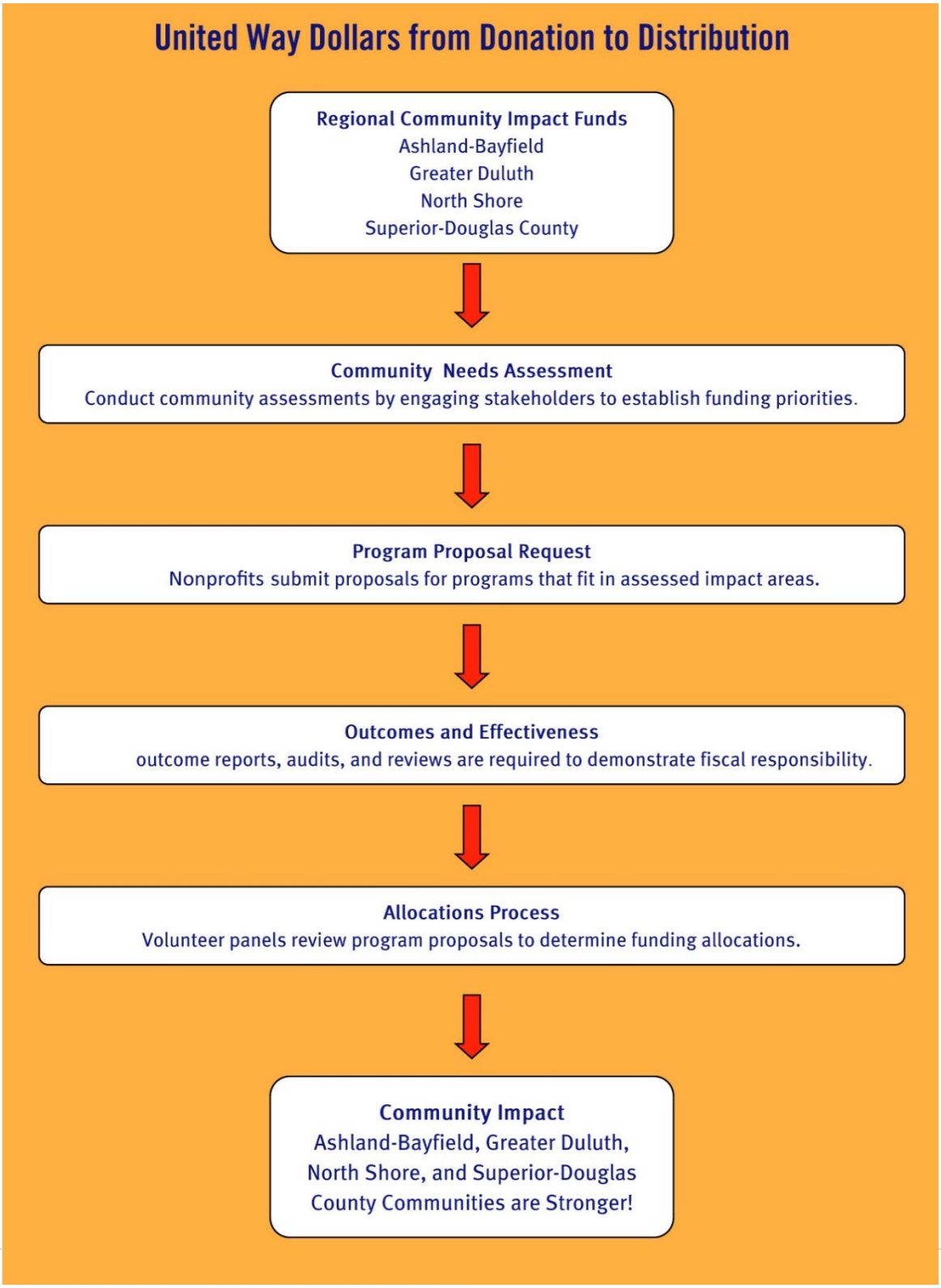
- Involve retirees or retiree groups in planning/solicitation and incorporate their campaign into the company's regular employee campaign
- Decide whether the retiree solicitation will be through direct mail and print media only or if it will involve a special retiree rally/event/reunion
- Offer a variety of payment options: automatic bank or credit card payment; automatic deduction from the retiree's pension check; monthly or quarterly billing though 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 toward 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 now live (e.g. Arizona, Florida, or Texas)

Phase II - Communication

- Offer retirees the opportunity to go on agency tours and to 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

HOW DONATIONS ARE USED

3.1 Your Gift at Work



HEAD OF THE LAKES UNITED WAY

Impact at a Glance

United Way
Head of the Lakes United Way

HOW DONATIONS ARE USED

Basic Needs

2,400,305 lbs of food distributed

297,306 articles of clothing distributed

55,110 nights of shelter provided

Education

6,764 youth served through community or out-of-school programs

2,374 at-risk youth received supportive services

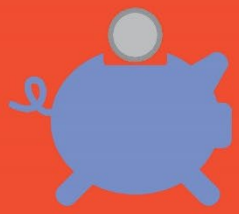
2,132 children supported in early childhood programs

Income/ Finances

1,419 people received support in filing taxes

3,943 people received financial counseling or employment counseling

5,515 people received career and employment services



Access to Health

18,238 uninsured/underinsured people received dental services

6,277 uninsured/underinsured youth and adults received physical health services

1,120 uninsured/underinsured youth and adults received mental health services

PRINTED IN-HOUSE

HOW DONATIONS ARE USED

3.2 Managing Questions and General FAQ

Some of your coworkers may have questions regarding 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
- **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 Questions:

How does United Way invest my gift?

Every two years, more than 40 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
- A program's responsiveness 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 Financial Stability. 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 local community needs.

What is the easiest way to contribute?

Payroll deduction is by far the most convenient method of contribution. A designated amount is taken from your paycheck each payday, allowing you to make a contribution each pay period that will 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

HOW DONATIONS ARE USED

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 12.14% of funds are used for resource development and only 8.03% are used for administrative costs.

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 contributions 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.

HOW DONATIONS ARE USED

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.

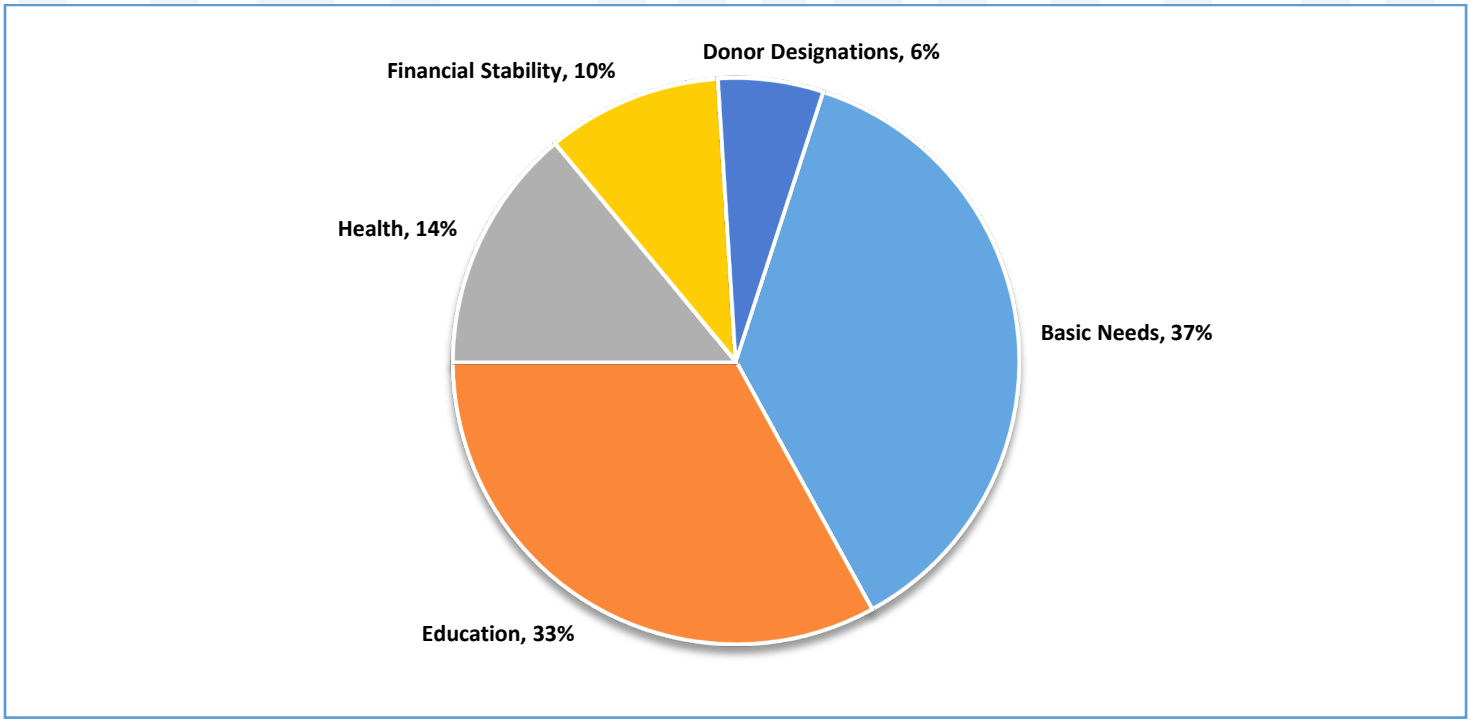
United Way employs a financial reporting system including annual member non-profit independent audits. Internal financial checks and balances were created to ensure United Way's stability and accountability.

Remember, if you need help answering questions, just call on HLUW staff for support!

HOW DONATIONS ARE USED

3.3 2018 Collective Impact Statistics

*Ashland-Bayfield Counties, Greater Duluth, North Shore (Lake & Cook Counties), and Superior-Douglas County



- **2,400,305** pounds of food distributed
- **297,306** articles of clothing distributed
- **250,610** meals served
- **55,110** nights of shelter provided
- **37,638** referrals made to connect people to needed services
- **19,540** people received legal assistance, case management or counseling services
- **18,238** uninsured or underinsured people received dental treatment
- **11,380** youth served through early childhood, mentoring, or out of school time programming
- **6,277** uninsured or underinsured people received physical health treatment
- **3,943** people received financial or employment/career coaching and counseling
- **2,374** at risk youth received supportive services
- **1,419** people received support in filing taxes

**Data is from 2018 as reported to HLUW by funded agencies.*

LIVE UNITED

HOW DONATIONS ARE USED

3.4 2019-20 HLUW – Partner Agencies/Funded Programs

ASHLAND-BAYFIELD COUNTIES

New Day Shelter
- *Basic Services Program*

The BRICK Ministries, Inc
- *Benevolence Program*

GREATER DULUTH

American Indian Community Housing Organization – AICHO
- *Gimaajii Healthy Families Initiative*

American Red Cross serving Northern MN and Douglas County WI
- *Disaster 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 Across Minnesota*

CHUM
- *Drop-in Center*
- *Emergency Shelter*
- *Health and Wellness Clinic*

Community Action Duluth
- *FAIM - Asset Development*
- *Jump Start*
- *Tax Preparation*

Courage Kenny Rehabilitation Institute - Northland
- *Adaptive Recreation Activities*

Damiano Center
- *Free Store*
- *Kids' Kitchen*
- *Community Kitchen*

Duluth Area Family YMCA
- *Out-of-School Time Program*

Duluth Community School Collaborative
- *Academic and Cultural Enrichment*

Girl Scouts of MN & WI Lakes and Pines
- *At-risk Outreach*

Goodwill Industries Vocational Enterprises, Inc.
- *Community Employment*

Human Development Center
- *Family/Individual Counseling*

GREATER DULUTH (cont.)

Just Kids Dental
- *Preventative Dental Health*

Lake Superior Community Health Center
- *Affordable Health Care Services*

Legal Aid Service of NE MN
- *Duluth Legal Services*
- *Expungement Project*

Life House
- *Youth Drop-in Center*
- *Futures Education Program*
- *Futures Employment Program*
- *Mental Health & Wellness Program*

Lutheran Social Services
- *Crisis Nursery*
- *Financial Counseling*
- *Foreclosure Prevention*
- *Together for Youth*
- *Truancy Action Project*

Men As Peacemakers
- *Boys Restorative Program*
- *Girls Restorative Program*

Mentor North
- *Mentor Duluth*

Positive Energy Outdoors
- *Low-income Youth Outreach*

Safe Haven Shelter and Resource Center
- *Legal Advocacy*

Second Harvest Northern Lakes Food Bank
- *Food Distribution Services*

SOAR Career Solutions
- *Re-entry Services*
- *Subsidized Employment Services*

The Hills Youth and Family Services
- *Cambia Hills*
- *Neighborhood Youth Services*

The Salvation Army - Greater Duluth Area
- *Emergency Assistance*
- *Family Transitional Housing*
- *Food Services*

Valley Youth Centers of Duluth
- *Youth After School and Summer Supportive Services*

Volunteer Attorney Program
- *Volunteer Attorney*

YWCA Duluth
- *Early Childhood Center*
- *Girls and Youth Programs*

NORTH SHORE

Care Partners of Cook County
- *Senior Chore*

Community Partners
- *engAGE*
- *Volunteer Services Program*

Just Kids Dental
- *Dental Literacy*

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*

Center Against Sexual and Domestic Abuse, Inc – CASDA
- *Emergency Shelter Services*

Challenge Center
- *Community Living Support Services*

Harbor House Crisis Shelters – HHCS
- *Children's Life Skills Enhancement*
- *Homeless Stabilization Project*

Health Care Clinic
- *Community Health Care*

Just Kids Dental
- *Preventative Dental Care*

Lake Superior Community Health Center
- *Affordable Health Care Services*

Lutheran Social Services of Wisconsin and Upper Michigan, Inc.
- *Financial Counseling*

Mentor North
- *Mentor Superior-Douglas County*

School District of Superior
- *After School Program*

Superior Douglas County Family YMCA
- *YMCA Membership Scholarships*

Superior Vocations Center Inc.
- *Employment Support Services*

Basic Needs | Education | Health | Income/Financial Stability

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At HLUW, we strive to provide accurate, up-to-date information on all of our printed materials. To view the most current list of HLUW Agency Partners, please visit ***www.hlunitedway.org*** 8/5/19

HOW DONATIONS ARE USED

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

3.5.1 Ashland-Bayfield Counties & North Shore of MN (Lake and Cook Counties)

- $12 per week makes it possible for a mother and child to receive 2 days of shelter for domestic violence/sexual assault situations
- $.96 a week will give a homeless family a motel voucher for 1 night
- $10 provides 10 children with oral health care supplies for improved oral health
- $5 will allow Two Harbors Food Shelf to acquire $50 worth of food
- $40 a week makes it possible to provide 24/7 domestic violence/sexual assault crisis line services for 1 week
- $5 = 12 full food shelf meals
- $20 will pay for a medical ride so an older adult can access their health care

3.5.2 Greater Duluth

- $8 per week will provide clean bedding for shelter guests for 1 month
- $25 provides overnight care for one child in a family experiencing crisis
- $1 per week allows for rescue and distribution of $7 worth of groceries
- $1 week allows a youth participant with a disability to learn how to swim
- $13.65 a week for one year buys dental supplies so that 100 children can receive preventative dental care
- $2 a week provides 5 memberships to Boys and Girls Club; a safe place for kids
- $1 a day supports 10 at-risk girls to receive financial literacy training
- $1 per week for one year provides 13 clients with a daily bus pass for school, work, or interviews
- $2.50 per week will provide comprehensive financial counseling to 1 household

3.5.3 Superior-Douglas County

- $2.60 a day for a month provides 20 days of safe shelter for a family of four
- $1.00 per week provides one at-risk child with swim lessons
- $5 per week provides a patient with an annual physical exam
- $1 per week provides 4H project training for five adult volunteers
- $20 per week can provide financial counseling for five families
- $3 per day provides warm showers, a laundry facility and toiletries for homeless families

SPECIAL GIFTS

4.1 Lake Superior Leadership Society

The Leadership Giving program is designed to encourage and recognize individuals or combined donors 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

Head of the Lakes United Way accepts stock gifts.

For more information or assistance to make a stock gift, contact Charles Fause at finance@hlunitedway.org or call (218) 726-4774.

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. 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 Matt Hunter at 218-726-4790 or mhunter@hlunitedway.org.

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
- Financial Stability

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 moments.

Through Head of the Lakes United Way, your dollars will be leveraged effectively to help provide basic needs, education, health, and financial stability. The success of our community depends upon the support you and I provide.

Please take some time 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)

Duluth AFL-CIO Central Labor Body
Duluth Labor Temple • 2002 London Road • Room 110
Duluth, Minnesota 55812
(218) 724-1413 (Telephone and Fax)

August 8, 2019

RE: 2019 United Way Campaign Endorsement

Dear Union Brothers and Sisters

Our local unions have been strong and loyal supporters of the annual United Way Campaign. The AFL-CIO and United Way have been strong partners for almost 80 years. AFL-CIO and United Way leaders across the country continue to work closely with community partners to address the root causes of social and economic inequality.

When we support the Head of the Lakes United Way, we're also supporting the work of the AFL-CIO Community Services liaisons. These liaisons work the United Way and other community partners to 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.

I ask that you join me and support the 2019 United Way campaign. When we all lend a helping hand we are able to lift up many.

In Solidarity,

Beth McCuskey

Beth McCuskey

President Duluth Central Labor Body

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
- Financial Stability

Sincerely,

(CEO or ECC)

Thank You - Sample 2

Dear (Name):

Thanks to you, the (Company Name) 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 mobilizing 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
- Financial Stability
- Health

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.

MN Power, an ALLETE Co, held a Campaign Carnival Kick-off in the MN Power Plaza including casino games, relay races and a pie-throwing booth!

Employees at Essentia Health held a region-wide chili feed for all Essentia employees (top) and Enbridge has fun with spinning for prizes (bottom)!

6.2 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.

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 than 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 constraints, 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

6.3 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 (syrups, 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!

6.4 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 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.

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.

6.5 Special Events: Other Great "Fun"draising Events

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

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

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

Sleep in Late Cards: Create 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.*

6.6 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: President Matt Hunter presents the LIVE UNITED award to Mark Sitek in honor of his volunteer service to United Way. Right: Deb DeLuca of Duluth Seaway Port Authority delivers her keynote speech during the 2018-19 Annual LIVE UNITED Luncheon.

WRAPPING UP THE CAMPAIGN

7.1 Reporting Results: Campaign Spreadsheet (template)

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.

Annual Workplace Campaign

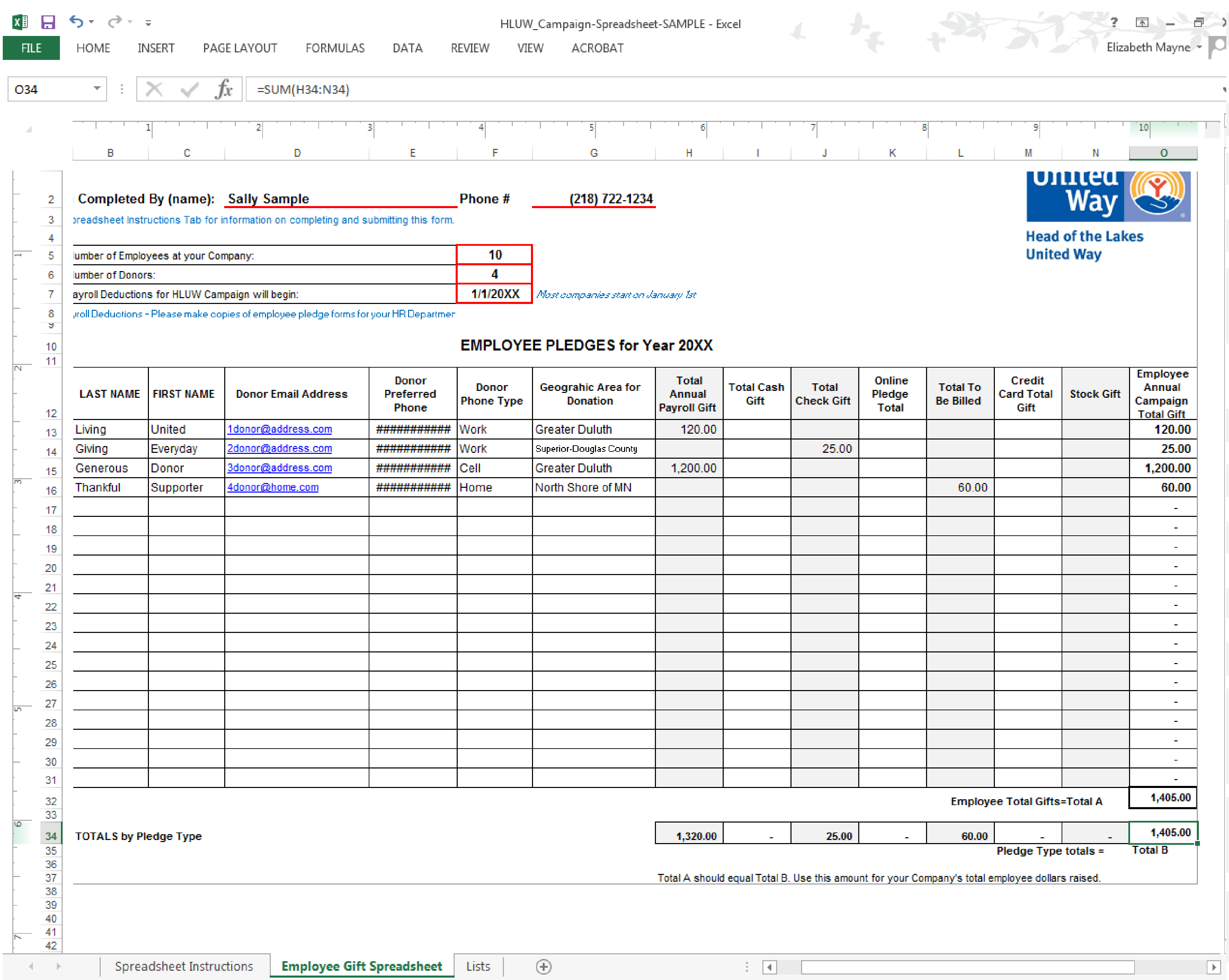
United Way
Head of the Lakes United Way

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 current 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 Annual 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!



HLUW_Campaign-Spreadsheet-SAMPLE - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

O34 =SUM(H34:N34)

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

preadsheet Instructions Tab for information on completing and submitting this form.

umber of Employees at your Company:	10
umber of Donors:	4
ayroll Deductions for HLUW Campaign will begin:	1/1/20XX

Most companies start on January 1st

yroll Deductions - Please make copies of employee pledge forms for your HR Departmer

Head of the Lakes United Way

EMPLOYEE PLEDGES for Year 20XX

LAST NAME	FIRST NAME	Donor Email Address	Donor Preferred Phone	Donor Phone Type	Geograhic 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
Living	United	1donor@address.com	###########	Work	Greater Duluth	120.00							120.00
Giving	Everyday	2donor@address.com	###########	Work	Superior-Douglas County			25.00					25.00
Generous	Donor	3donor@address.com	###########	Cell	Greater Duluth	1,200.00							1,200.00
Thankful	Supporter	4donor@home.com	###########	Home	North Shore of MN					60.00			60.00
													-
													-
													-
													-
													-
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													-
													-
													-
													-
													-
													-
													-
													-
													-
												Employee Total Gifts=Total A	1,405.00
TOTALS by Pledge Type						1,320.00	-	25.00	-	60.00	-	-	1,405.00
												Pledge Type totals =	Total B

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

Spreadsheet Instructions | Employee Gift Spreadsheet | Lists

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:

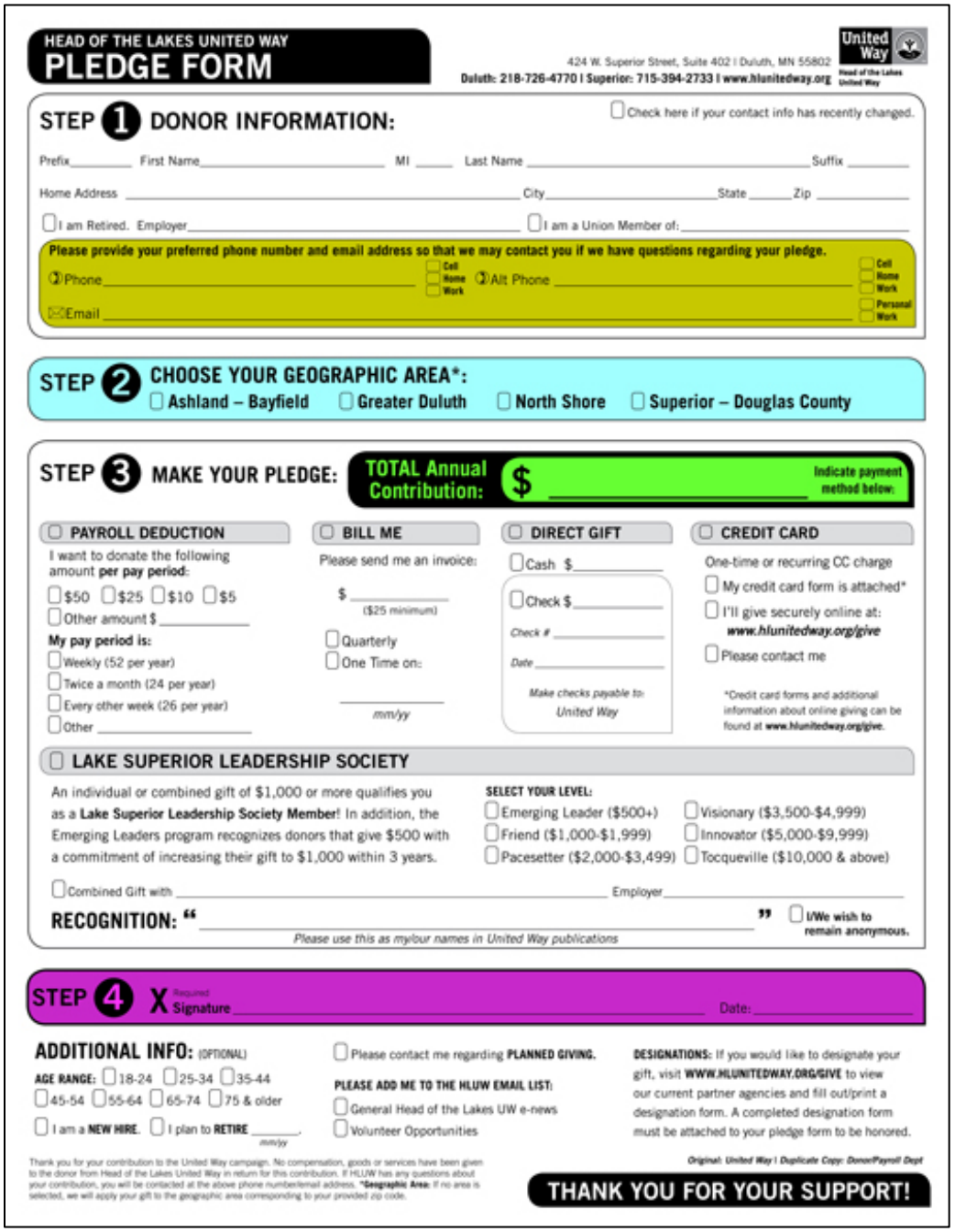
PERFORM THE 4 CHECKS ON EACH PLEDGE FORM:

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.hlunitedway.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 Cell Home Work Alt Phone Cell Home Work

Email Personal Work

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.hlunitedway.org/give

Please contact me

*Credit card forms and additional information about online giving can be found at www.hlunitedway.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.

SELECT YOUR LEVEL:

Emerging Leader ($500+) Visionary ($3,500-$4,999)

Friend ($1,000-$1,999) Innovator ($5,000-$9,999)

Pacesetter ($2,000-$3,499) Tocqueville ($10,000 & above)

Combined Gift with Employer

RECOGNITION: " " I/We wish to remain anonymous.

Please use this as my/our names in United Way publications

STEP 4 X Required 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.HLUNITEDWAY.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.

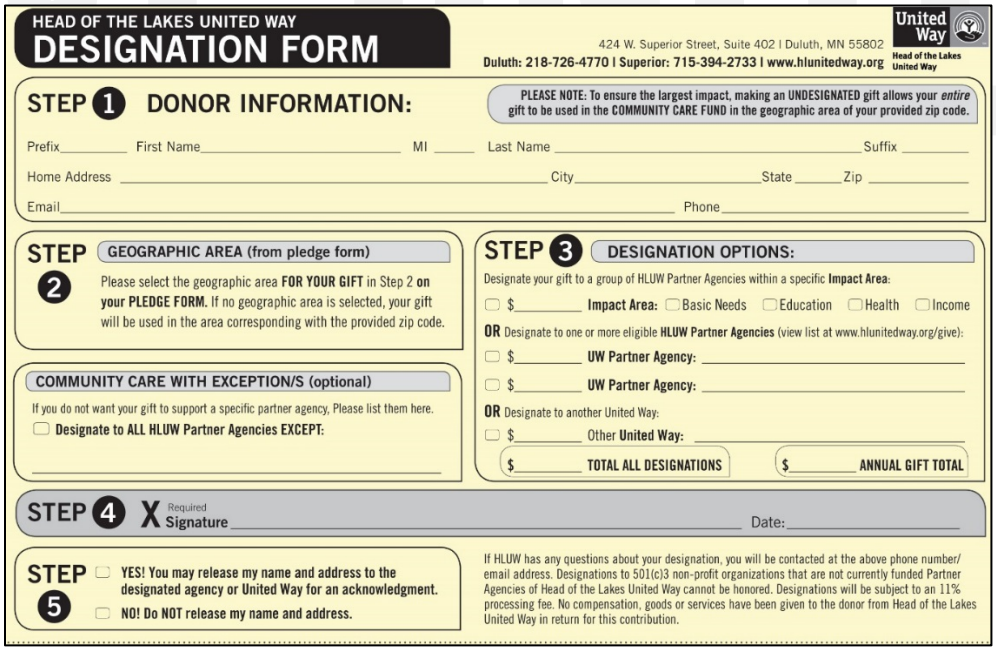
Original: United Way | Duplicate Copy: Donor/Payroll Dept

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.

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 I Duluth, MN 55802
Duluth: 218-726-4770 I Superior: 715-394-2733 I www.hlunitedway.org

United Way 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)

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 X Required **Signature** _____ Date:_____

STEP 5

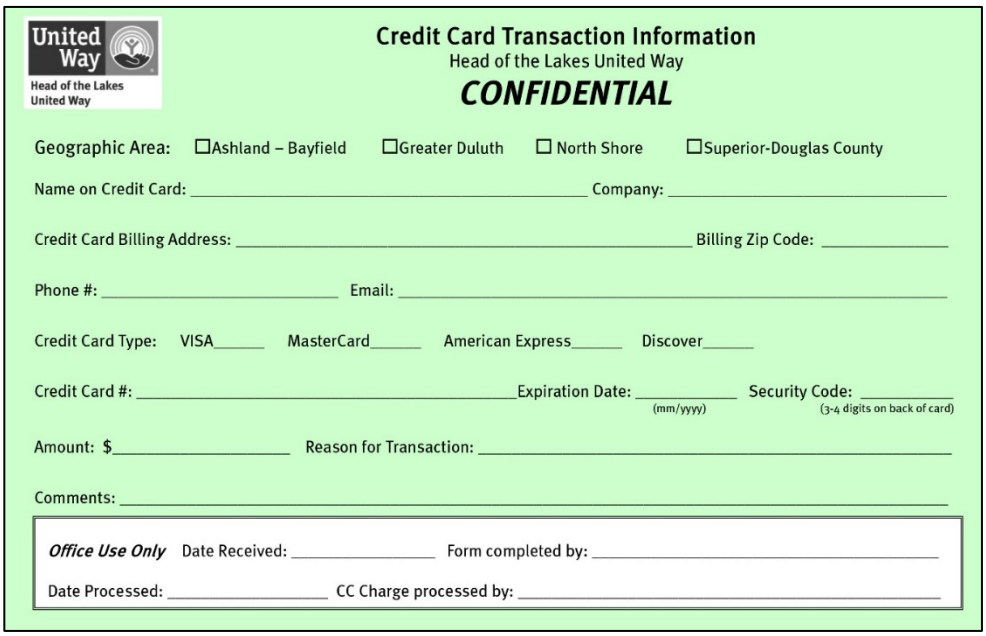
☐ **YES! You may release my name and address to the designated agency or United Way for an acknowledgment.**

☐ **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.



United Way 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: _____ (mm/yyyy) Security Code: _____ (3-4 digits on back of card)

Amount: $_____ Reason for Transaction: _____

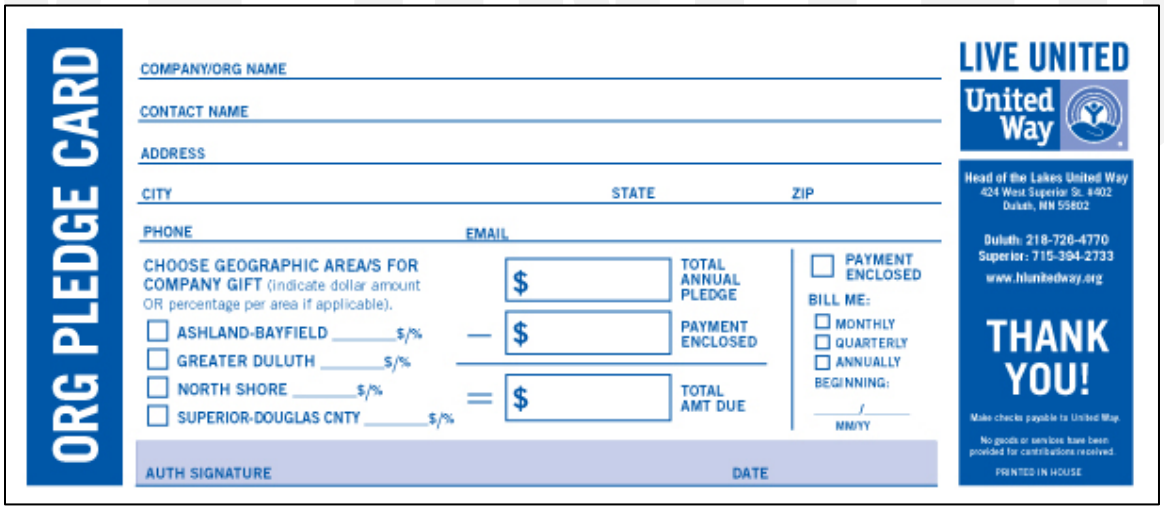
Comments: _____

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

CONTACT NAME

ADDRESS

CITY STATE ZIP

PHONE EMAIL

CHOOSE GEOGRAPHIC AREA/S FOR COMPANY GIFT (indicate dollar amount OR percentage per area if applicable).

- ☐ ASHLAND-BAYFIELD _____$/%
- ☐ GREATER DULUTH _____$/%
- ☐ NORTH SHORE _____$/%
- ☐ SUPERIOR-DOUGLAS CNTY _____$/%

$ TOTAL ANNUAL PLEDGE

— $ PAYMENT ENCLOSED

= $ TOTAL AMT DUE

☐ PAYMENT ENCLOSED

BILL ME:

- ☐ MONTHLY
- ☐ QUARTERLY
- ☐ ANNUALLY

BEGINNING: ____/____ MM/YY

AUTH SIGNATURE DATE

LIVE UNITED

United Way

Head of the Lakes United Way
424 West Superior St. #402
Duluth, MN 55802

Duluth: 218-726-4770
Superior: 715-394-2733
www.hlunitedway.org

THANK YOU!

Make checks payable to United Way

No goods or services have 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 4 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.

Head of the Lakes United Way

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

Please complete ALL sections!

STEP 1. COMPANY INFORMATION

PLACE ADDRESS LABEL HERE (OPTIONAL)

Organization name: _____ # Employees: _____

Envelope completed by: _____ Date: _____

Email: _____ Phone: _____

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.

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)		$	$

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 #			

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.

Barbecue or Pizza Party

Invite employees to a company-wide catered lunch.

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 logo sack lunch bags 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.

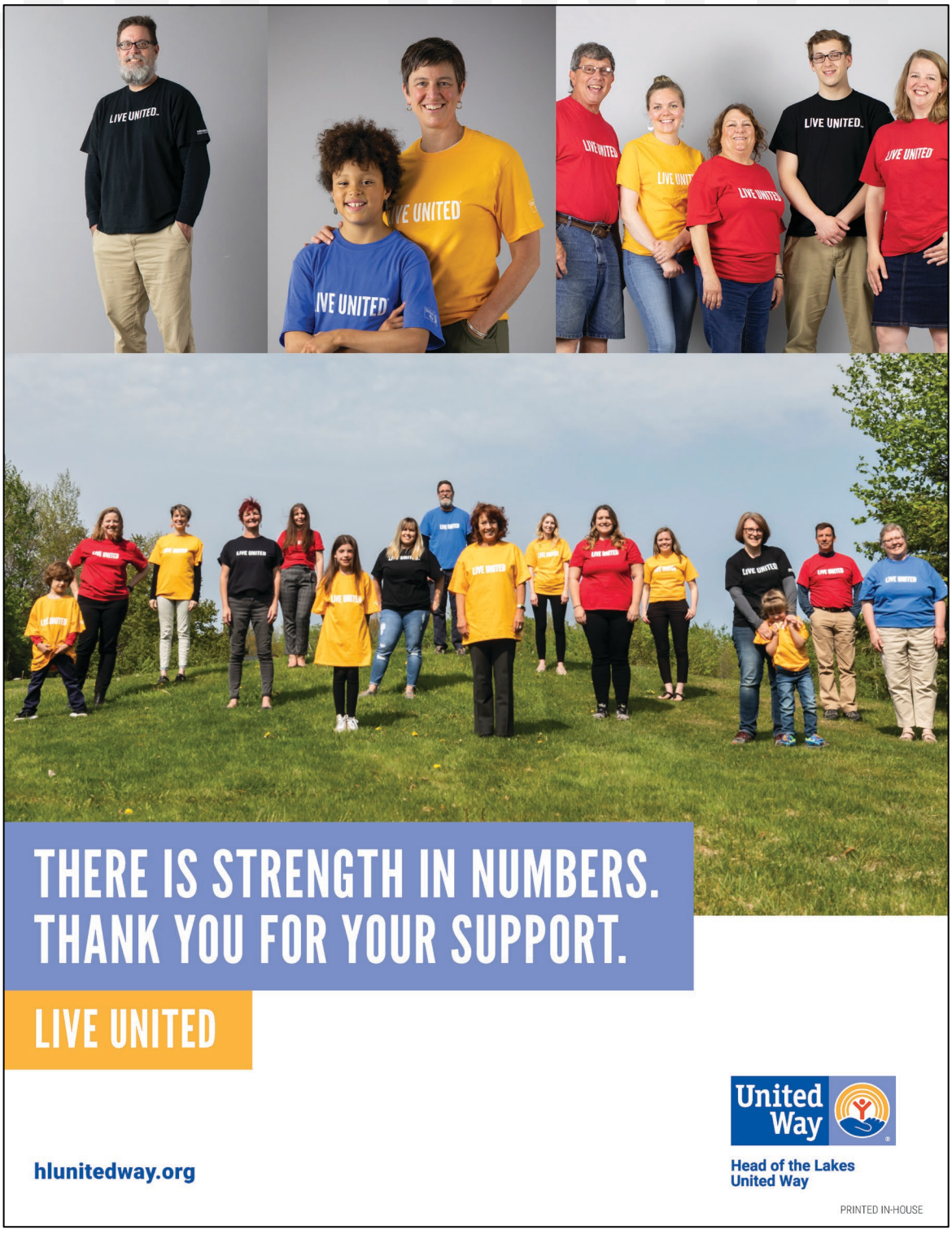
Chip in for United Way

Place purchased 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.



STRENGTH IN NUMBERS

LIVE UNITED®

PRINTED IN-HOUSE

Powerful change can occur when people unite to create something larger than one person could possibly create on their own. There is STRENGTH IN NUMBERS.

We have one life. To live better, we must LIVE UNITED. Join us at **hlunitedway.org**.

United Way

Head of the Lakes United Way

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