WE MAKE A LIVING BY WHAT WE GET
WE MAKE A LIFE BY WHAT WE GIVE

-Winston Churchill

THE GENTLEwoman CONTRIBUTIONS FROM 2018-2019 PROVIDED OVER

96,000 DIRECT SERVICES

25 Community Grants
90 Strong Families Participants
2,500 Free tax returns
185 ReadingPal Students
242 families served in Success by 6
21,000 individuals helped through 2-1-1
14 agencies received FEMA funds
PRODUCING RESULTS
TO IMPACT OUR COMMUNITY

Without your hard work and generosity, our mission to **fight for the health, education and financial stability of every person in Marion County** would not be possible. By agreeing to lead the United Way Annual Giving at your workplace, you are an integral part of the success of that mission. That’s why we want to help make your workplace annual giving easy and fun!

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**We think CREATIVELY**

Plan a unique and ENGAGING year! Special events or volunteer service projects are a great way to add fun and purpose to your annual giving. See page 6 for some ideas!

**We stand for SIMPLICITY**

Step-by-step instructions, along with a detailed worksheet, make planning your annual giving a BREEZE! See pages 10-11 to get started!

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**We believe in TEAMWORK**

Don’t worry - we’re here to HELP! We provide staff and/or volunteers to work with you to help plan and grow your annual giving efforts. Learn about easy ways to increase participation on page 5.

**We make an IMPACT**

From agency speaker testimonies to impact results, we provide the information on how your dollar is making a difference in Marion County! All available Annual Giving materials are listed on page 7.
LEADERSHIP GIVING

United Way’s Leadership Giving Societies recognize those members of our community who demonstrate an exceptional commitment to helping others. We proudly acknowledge our Leadership contributors by inviting them into the Eclipse Club ($1,000-$9,999) or Toqueville Society ($10,000 and above).

WOMEN UNITED

United Way’s Women United celebrates the power of women to bring about positive change in our community through philanthropy and service.

As women ascend to leadership positions in business and the community, their ability to make meaningful contributions of time, talent and resources increases. Any woman who pledges $1,000, by herself or through her spouse, can automatically become a part of Women United. For women not at that donation level, a membership gift of $125 will enroll them in the group.

Women United has allocated $442,000 over the past 12 years to local agencies focused on women and children. Most recently, Women United has pledged to help fund United Way’s early literacy program, ReadingPals. ReadingPals are volunteers who are matched with at-risk kindergarten students to help them with their reading skills. Kindergarten students experience one-on-one reading time with their Pal and also get to build their library with weekly books to take home.

CARING CLUB®: THE GIFT THAT KEEPS GIVING BACK

To thank donors for their generosity, United Way created the Caring Club® card. It’s a way for donors to get great discounts on food, entertainment and valuable services from more than 40 merchants around Marion County. Members also have the satisfaction of knowing that their gift has made a difference in the lives of children, families, seniors and others in need. It’s just our way of saying thanks for caring for our community.

LOYAL CONTRIBUTORS

United Way of Marion County recognizes that some of our donors have been contributing to United Way for a long time. We ask donors who have given to United Way for 10 or more years to self-identify themselves on their pledge forms to let us know how long they have supported United Way. In addition, United Way honors our Diamond Donors who have given for more than 25 years.

GIVING A LITTLE

By simply giving a minimum undesignated gift of $156 (that’s just $3 a week in payroll deduction), you qualify for the Club.

For a current list of Caring Club® participating merchants and their discounts, visit our website at www.uwmc.org/CaringClub.
“Great things in business are never done by one person. They’re done by a team of people.” - Steve Jobs

IDEAS TO IMPLEMENT:

» Emphasize that United Way helps family/friends/co-workers who have fallen on hard times.

» Award a “jeans day” pass when people make a payroll deduction gift (you can set a donation level or participation deadline).

» Stress giving back to the community that supports you (particularly effective in the public service and education fields).

» Provide special incentives or recognition for first-time donors, such as a personalized thank you from the local CEO or a corporate match for new donors.

» Encourage 100% of employees to login to the pledge site/fill out paper form with incentives for anyone who “participates.”

» Expose employees to agencies and local United Way initiatives (speakers, tours, reasons why their donation matters).

» Arrange for a “testimonial” from an employee who has received services from a United Way agency to put a face to United Way.

» Have a campaign appeal come from someone other than senior leader—from a co-worker instead.

» Provide a special treat to the department with the largest percent participation.

» Personalize your pledge forms by adding the employee’s name on a label.

» Start a “viral” email that employees can pass on to their co-workers.

» Provide a compelling message (stories, video, speaker, etc.) to share the success of United Way. Utilize your United Way staff and/or volunteer to help.

» Set up an interdepartmental contest for highest % participation.

» Provide more volunteer opportunities for employees to help them better understand the needs in our community.

» Provide stickers to each employee who turned in a pledge form (e.g. “I Gave to United Way Today”).

» Enlist the help of department leads to track that every employee has been asked and knows how to give.

» Post company goals and progress in a visible location. Celebrate milestones.

INCENTIVE EXAMPLES:

Incentives can increase participation or increase the average gift of your employees. Distribute a schedule of incentives and how they will be awarded (e.g. first time contributor, top performing department, and largest gift increase).

» Time off
» Casual Day
» Catered Breakfast by Senior Management
» Reserved/Covered Parking
» Tickets to Games/Movies
» Company shirts
» Dinner for two
» Gift Card
» Hotel Giveaways
» Airline tickets
SPECIAL EVENTS/FUNDRAISERS

Holding a special event as part of your company’s annual giving efforts raises awareness and resources for United Way while having fun and engaging your employees.

United Way Carnival—Have carnival games and food for employees to enjoy (bag toss, pie in the face, executive dunk tank, etc.)

United Way Trivia Contest—Get your questions from United Way fact sheets and other materials and offer a prize to the person who gets the most questions correct. The quiz can be distributed via voicemail or email.

Appreciation Grams—Employees can purchase a note of thanks, recognition or good wishes to be sent to a colleague along with candy, flowers, or small gift.

Chance Bake Sale—Homemade or store bought items are brought in and displayed in a breakroom or cafeteria. Employees purchase chance tickets and winners are drawn.

Cook-off Competition—Employees decide on the food that will be featured in the competition and compete to win the most votes. Colleagues pay a fee to taste the entries, with the proceeds supporting United Way.

Identify the Baby Photo Contest—Favorite baby pictures are brought in, numbered and posted on a bulletin board. Employees purchase a chance to match coworkers with their baby pictures. Employee with the greatest number correct wins a prize!

Pumpkin Decorating Contest—Employees form teams and create their own unique designs. The pumpkins are displayed and employees vote for their favorite pumpkin by placing money in that team’s container.

VOLUNTEER PROJECTS

A great way to engage employees and experience first-hand the difference United Way is making.

EDUCATIONAL EVENTS

United Way Annual Giving is a great opportunity to educate your workforce about services in our community. Here are some suggestions for easy ways to effectively educate employees.

» Request a speaker from United Way to speak at an event.

» Ask employees who have benefited from a United Way funded service, or volunteered, to speak at employee meetings, or feature their stories in company newsletters.

» Publish a special issue of the company newsletter or annual giving newsletter entitled “How I LIVE UNITED” to highlight how employees are giving, advocating and volunteering. Also include stories of employees helped by United Way, and key campaign dates and events.

» Show the annual giving video continually in lunch rooms or break rooms, where appropriate.

» Use email and/or voicemail to send annual giving messages and daily facts. Utilize a signature picker to advertise participation in the campaign.

» Attend the United Way Annual Meeting/Kick-Off and other special events.

» Take employees on a LIVE UNITED Tour to get an up close and personal view of contributions at work and how agencies work together to create a strong safety net for the community.

STRATEGIES TO INCREASE THE AVERAGE GIFT:

» Give employees extra time off for increasing their gift by 10 percent.

» Hold a leadership giving campaign.

» Stress the ease of payroll deduction. Offer extra incentives for those who give that way.

» Ask employees to give $1 more a week.
United Way fights for the health, education and financial stability of every person in Marion County. Reach out a hand to one, and influence the condition of all. Give. Advocate. Volunteer. LIVE UNITED.

LIVE UNITED is a reminder that when we think outside of ourselves, we have the power to facilitate change. When we think of others’ lives as linked to our own, our compassion grows. We strengthen neighborhoods. We bolster the health of our community, and we change the lives of those who walk by us every day.

Did you know that United Way of Marion County funds 25 programs through 22 agencies in Marion County? It helps one in five of our neighbors. Thank you for your support of United Way.

United Way of Marion County unites local resources to help our neighbors. It is a community-based, community-run organization that depends on people like you for support.

There are basic things that we all need for a good life: a quality education that leads to a stable job, income that can support a family through retirement, and good health. United Way partners with programs that address all three.

United Way funded programs are held accountable for the results they achieve. More than 56 community volunteers annually review and monitor agency programs for results and cost effectiveness. Future funding decisions are based on the performance and impact these programs have on community need.

When you give to United Way of Marion County, your money goes far...but not far away. Dollars raised in Marion County stay in Marion County, to help build a community that is a better place to live, work and prosper.

Review “A Difference A Dollar Makes” information on the back of the pledge form and help educate employees about the value of their giving.

Did you know that when you give a 100% undesignated gift of $156 ($3 per week), or more, annually to United Way, you can enjoy the rewards of a Caring Club® card (discounts on local dining, entertainment and services). For more details, visit www.uwmc.org/CaringClub.

United Way of Marion County is a volunteer-driven, non-profit organization that efficiently and effectively helps those most in need in Marion County.

Visit UWMC.ORG/WorkplaceResources to print and request materials.
8 STEPS FOR LEADING AN EFFECTIVE WORKPLACE CAMPAIGN

1. INVOLVE TOP MANAGEMENT

Confirm support of top management and keep them engaged. If your CEO endorses the campaign, employees are more likely to participate.

- **Meet** with your CEO to discuss the objective of the campaign, employee goals, and possible donor incentives.
- **Ask** your CEO to allow time for training, group meetings and agency tours.
- **Ask** your CEO to endorse the campaign through personal letters and/or emails, and to attend the kick-off.
- **Ask** your CEO to determine the amount of your corporate contribution.

2. BUILD YOUR TEAM. RECRUIT HELP.

Successful campaigns are the result of a varied and inclusive team. Be sure to include representatives from many levels of management, line staff and departments.

- **Form** a campaign committee to spread enthusiasm and the workload.
- **Attend** an Employee Campaign Coordinator Workshop & the United Way Kick-Off Event.
- **Tour** a United Way of Marion County agency to see first-hand how your donation helps people in need. Coordinate tours through United Way.
- **Meet** with a United Way representative or volunteer to make sure you have all the tools you need to start your campaign.

3. DEVELOP A GOAL AND/OR THEME.

Goals and themes can help motivate employees and build morale.

- **Look** at past results, keeping in mind:
  - The number of contributors
  - The total amount raised
  - The participation rate
  - Average employee gift
- **Based** on what you find, consider setting realistic and challenging goals.
- **Set** a specific time frame for the start and finish of your campaign.

4. DEVELOP LEADERSHIP GIVING

Individuals who give $1,000+ are considered Leadership Givers. Commitment from top leaders will motivate the rest of the organization to get involved.

- **Review** prior year’s results and identify current leadership donors and prospective donors.
- **Conduct** a separate leadership meeting with your CEO and senior management.
- **Peer-to-peer** solicitation is key in leadership giving. Ask your CEO to appoint an executive who will solicit members of the management team for leadership gifts.
- **Provide** United Way with proper spelling of names, job titles, and investment amounts for each leadership donor. This will ensure proper recognition of their generosity.
- **Send** thank you notes to each leadership donor.
- **Ask** your CEO to host a reception to acknowledge leadership donors.

QUICK TIP!

Research tells us that people give more often when someone has personally asked them to contribute, either in a group setting or one-on-one. Employees do not feel asked if the pledge card is slipped into their inbox (and therefore will probably not give).
5. PROMOTE AND PUBLICIZE

Sharing information about United Way is critical in reaching your annual giving goals.

• **Use** your in-house newsletter or other form of company communication to promote the campaign.
• **Display** United Way posters and materials throughout the building.
• **Use** the posters to communicate key dates.
• **Use** voicemail, e-mail and/or other media to educate employees about United Way and to share the progress of the campaign.
• **Call** your United Way of Marion County contact to request promotional material.

6. LAUNCH YOUR CAMPAIGN

Inform, engage, ask and thank.

• **Have** a kick-off event and small group/branch/department meeting(s) to share campaign details.
• **Include** the president/CEO, a United Way representative and/or agency speaker, and/or a company employee with his or her own United Way story.
• **Share** United Way educational materials and pledge forms.
• **Show** the United Way video.

**SAMPLE KICK-OFF MEETING AGENDA**

- **WELCOME AND ENDORSEMENT,** as well as thank employees for last year’s participation: CEO -- 2 minutes
- **OVERVIEW OF ANNUAL GIVING:** Employee Campaign Coordinator -- 2 minutes
- **TESTIMONIAL:** Employee, partner agency representative and/or United Way video -- 5 minutes
- **MAKING THE CASE** for giving to United Way. Remind employees of the impact United Way has on the community: United Way staff representative or volunteer -- 4 minutes
- **DISCUSS COMPANY GOALS** and solicitation: Employee Campaign Coordinator -- 5 minutes
- **CLOSING, COLLECT FORMS:** Employee Campaign Coordinator -- 2 minutes

**TOTAL:** 20 minutes

7. WRAP UP AND REPORT RESULTS

You’ve done an outstanding job! It’s time to wrap things up. Here are things to keep in mind as your campaign comes to a close.

• **Share** campaign updates and results with employees.
• **Collect** all pledge cards.
  - Make sure you make a copy of the pledge cards you receive and give to your payroll department. Give the original form to United Way of Marion County.
  - Make sure each donor has signed his/her pledge card.
• **Complete** Report Envelope and inserts.
  - Record all givers and amounts on the pledge listing sheets. Take note of those who gave $500 or more (Winner Circle and Leadership Givers).
  - If someone designates his/her gift, please indicate that on the appropriate form.
  - On the envelope, please note the total number of donors to date, total number of employees and total dollars raised.
• **Contact** your United Way representative or volunteer to pick up the report envelope or drop it by the United Way office.

8. THANK EVERYONE AND CELEBRATE

Thank everyone who worked on the campaign and invested in United Way.

• **Report** final results through company internet or email messages.
• **Thank** your annual giving committee and CEO.
• **Recognize** employees and departments that had great results in contributions, participation and/or increase in average gift.
• **Share** with employees the difference their gifts make (stories, results from funded programs, etc.). It’s important that each individual employee feels our gratitude.
• **Have a thank you reception.**
# PLANNING WORKSHEET

## 1. INVOLVE TOP MANAGEMENT

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<th>Item</th>
<th>Details</th>
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<tr>
<td>CEO INVOLVEMENT:</td>
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<td>INCENTIVES:</td>
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<tr>
<td>CORPORATE GIFT:</td>
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<tr>
<td>KICK-OFF DATE(S):</td>
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## 2. BUILD YOUR TEAM

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<tr>
<td>TEAM MEMBERS:</td>
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<td>UNITED WAY STAFF/VOLUNTEER:</td>
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<td>TEAM MEETING DATE(S):</td>
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## 3. DEVELOP GOAL AND/OR THEME

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<tr>
<td>ANNUAL GIVING GOAL ($ OR % INCREASE)</td>
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<td>ANNUAL GIVING THEME</td>
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<tr>
<td>SPECIAL EVENT(S)</td>
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<td>HOW WILL YOU SHARE THIS INFORMATION?</td>
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## 4. DEVELOP LEADERSHIP GIVING

<table>
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<td>NUMBER OF 2018 LEADERSHIP DONORS</td>
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<td>GOAL FOR 2019</td>
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<tr>
<td>LEADERSHIP GIVING CHAIR</td>
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<tr>
<td>LEADERSHIP GIFT SOLICITATION PLAN (EX. PEER-TO-PEER ASK)</td>
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</table>
5. PROMOTE AND PUBLICIZE

VEHICLES TO COMMUNICATE WITH EMPLOYEES:

- REQUEST CAMPAIGN MATERIALS (ONLINE AT UWMC.ORG/WORKPLACERESOURCES

PROMOTE & PUBLICIZE TIMELINE & RESPONSIBLE PARTIES:

6. LAUNCH YOUR CAMPAIGN

DATE: ______________ TIME: ______________ LOCATION: __________________________

HOW WILL EMPLOYEES BE INVITED TO KICK-OFF? (WILL YOU NEED MULTIPLE DATES?)

KICK-OFF AGENDA CHECKLIST:

- CEO SPEAKER/ENDORSEMENT
- ANNUAL GIVING VIDEO
- UNITED WAY SPEAKER
- UNITED WAY MATERIALS
- PLEDGE FORMS

PLEDGE FORMS DUE: ______________ GIVE PLEDGE FORMS TO: __________________________

KICK-OFF FOCUS/TOPICS:

VOLUNTEER PROJECT(S):

7. WRAP UP AND REPORT RESULTS

PLEDGE REMINDER SCHEDULE & VEHICLE

- EMAIL
- PRINTED REMINDER IN MAILBOX
- OTHER:

DATE(S): ______________ ______________ ______________

- ANALYZE RESULTS & DETERMINE FOLLOW-UP STEPS
- COMPLETE SPECIAL EVENTS & FUNDRAISERS (OPTIONAL)
- COLLECT DONATIONS (PLEDGE FORMS & ANY ONE-TIME GIFTS)
- RECORD PLEDGES ON REPORTING ENVELOPE INSERTS OR ON ELECTRONIC FORM (PRINT & INCLUDE)
- MAKE COPIES OF PLEDGE FORMS AND GIVE TO PAYROLL
- GIVE ORIGINAL FORMS TO UNITED WAY OF MARION COUNTY
- PACKAGE & TURN-IN REPORTING ENVELOPE AND MATERIAL TO UNITED WAY

8. THANK EVERYONE AND CELEBRATE SUCCESS

PLAN TO PUBLICIZE SUCCESS: (EX. NEWSLETTER, SOCIAL MEDIA)

THANK YOU EVENT FOR EMPLOYEES (OPTIONAL BUT RECOMMENDED)

DATE: ______________ TIME: ______________ LOCATION: __________________________

WHO SHOULD RECEIVE THANK YOU NOTES (EX. KEY VOLUNTEERS, DONORS)
CONTACT US

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