



COMPANY COORDINATOR GUIDE



United Way
of the Southern Tier

YOU ARE MAKING AN IMPACT IN OUR COMMUNITIES

The United Way Annual Giving Moment is about bringing people together to address our community's most important issues. As a United Way Campaign Coordinator, you stand alongside thousands of other volunteers who are dedicated to making a measurable impact in the lives of the people in our communities.

Due to the success of the workplace annual giving moments, the generosity of our donors, and the dedication of our volunteers, United Way of the Southern Tier funds over 70 programs throughout Steuben and Chemung Counties. These programs are hard at work each and every day improving lives and advancing the common good right here in your neighborhood.



This handbook focuses on the role and responsibilities associated with a Workplace Annual Giving Moment. It is designed to lead you step-by-step through a United Way Moment while offering tools, tips, and best practices to ensure success. While this guide offers a good overview of United Way of the Southern Tier, it does not answer every question. More resources are available at our United Way and through our United Way representative. Please visit our website, www.uwst.org.

Thank you for volunteering to be part of the Annual Giving Moment. By lending your time and talent, and spreading the word, you are helping to advance the common good. Together, united, everyone can inspire hope and create opportunities for a better tomorrow.

This is what it means to LIVE UNITED!



Thank you for serving as an campaign coordinator for the 2019 United Way Annual Giving Moment.

As a coordinator, you have the unique opportunity to harness the generosity, talent, and energy of your workplace to give back to our community and help United Way’s efforts to unite and prioritize resources to improve the quality of life for every person and every family in our community.

Whether it is your first year as a coordinator, or if you are a Giving Moment veteran, the information in the guide will help you plan and execute a smooth – and successful – United Way Annual Giving Moment.

We encourage you to take advantage of the materials we’ve provided, and know your United Way Annual Giving Manager is always ready to support you in every possible way.

Thank you, again, for joining our United Way Team!

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ABOUT OUR UNITED WAY

OUR MISSION

United Way of the Southern Tier works to unite and prioritize resources to improve the quality of life for every person and every family in our community.

OUR 3 PRIORITIES

1. SOUTHERN TIER KIDS ON TRACK

Education is the first step to bridging the opportunity divide. Giving children the skills to succeed in school sets them up for lifelong success and lays a foundation that will span generations to come. Providing parents with trusted knowledge and tools allows them to be engaged and help the next generation thrive. Education is the change that lasts!

SCHOOL READINESS — Children start learning at birth. By encouraging the social, physical and emotional development of young children, we lay the foundation for their success in school and life. This includes making sure children are excited about learning and that's why United Way of the Southern Tier is now an affiliate of **Dolly Parton's Imagination Library**. This program provides a free book by mail each month to registered children in Chemung and Steuben counties until they reach their 5th birthday.

SUMMER LEARNING LOSS — During the summer, children need to stay engaged to prevent losses in literacy and other academic areas. Summer learning programs can mitigate loss and even provide academic gains.

SUPPORTING FAMILIES — Engaging parents to become partners in their child's education is a key component for future student success. This includes encouraging children to be in school, avoiding absences and improving reading proficiency and graduation rates.



ABOUT OUR UNITED WAY

2. SOUTHERN TIER BASIC NEEDS NETWORK

United Way of the Southern Tier is committed to taking care of our most vulnerable neighbors. This includes those needing food for themselves and their families, and those needing longer-term shelter, both to prevent and address homelessness.

In addition to meeting basic needs, United Way supports programs that help to educate our neighbors on managing credit, focus on debt reduction, and prepare individuals with knowledge regarding asset-building to provide a more stable future for themselves and their families.

A child's economic circumstances can affect his or her academic success. In the Southern Tier, one in four children under the age of 6 is living below the poverty level. Where young children are living with a single mother, 59% of those households are living in poverty. That is 20% higher than the New York State average. For our neighbors aged 65 and older (30,738), 8% are living below the poverty level; that's more than 2,400 seniors.

3. SOUTHERN TIER SENIOR SUPPORT NETWORK

United Way of the Southern Tier is committed to helping our senior population age safely in their homes. This includes those who need assistance to care for themselves, or in accomplishing their activities of daily living in and around the home. This also includes those who need home-delivered meals to meet their nutritional needs, or need transportation to medical appointments or the grocery store.

In Chemung and Steuben Counties, there are more than 48,000 "Baby Boomers" (people born between 1946 and 1964) who are in or nearing their "Golden Years." According to AARP, nearly three-quarters of all Baby Boomers would like to stay in their own homes, or at least in their own communities, as they age.

Feelings of loneliness and isolation can lead to serious consequences for senior health. In Steuben and Chemung counties, nearly half of all households of those aged 65 and above are seniors living alone. In addition to providing supports that help the elderly age at home for as long as is safely possible, other programming is available to help seniors remain active and engaged.

Nationwide, over half a million grandparents were the persons with primary responsibility for their grandchildren who lived with them. In Chemung and Steuben Counties, over 1,300 grandparents are raising their grandchildren. United Way is making sure family strengthening supports are available to assist grandparents who are responsible for the young people in their care.



WHAT, WHY, HOW...

WHAT WE DO

At United Way, we focus on advancing the common good by creating opportunities for a better life for all. United Way is less about helping one person at a time and more about changing systems to help us all. We all benefit when a child succeeds in school, when individuals and families have the basic needs to flourish, and our seniors are living a stable and comfortable life at home.

HOW WE DO IT

United Way of the Southern Tier focuses on children, seniors, and basic needs because they are the foundation for a successful life and future. United Way, partner agencies, community experts, and volunteer teams work together to identify the most important community needs and develop impact strategies designed to address the underlying causes.

WHY WE DO IT

United Way plays a crucial role in our communities. No individual or organization can solve our community's problems alone. United Way brings together community stakeholders, contributors, and agency partners to create collaborative and innovative approaches to community issues.

HOW YOU CAN HELP

Becoming a part of the change is easier than you might think. United Way is asking everyone to give, advocate, and volunteer because, together, our resources, voices, and actions can make a real difference right here in Steuben and Chemung counties.

OUR COMMUNITY IMPACT

United Way mobilizes the resources needed—people, relationships, knowledge, technology, and money—to identify root causes, target lasting changes and remove barriers, improving lives, now and for years to come. Working with partners and stakeholders, we track progress and results.

OUR RESPONSE

United Way encourages, funds, and oversees the very best health and human services programs in the areas of children, basic needs, and senior supports. Our approach is unique because we address not only immediate needs, but we also work toward changing the status quo so that people can avoid problems in the first place. It is about investing in the foundation and in the future.



8 WEEKS before kickoff

- Meet with your United Way Annual Giving Manager to review past performance and explore upcoming campaign themes and materials
- Develop campaign goals and identify opportunities and challenges
- Draft strategies, including fundraising activities, to meet these goals and improve on last year's results
- Determine company pledge entry method:
 - * Digital Giving
 - * Paper Pledge Forms
 - * Both
- Determine Annual Giving Moment start and end dates. (The most effective are kept to 1-2 weeks. Starting and ending a campaign with a clear kickoff and wrap up are important factors when creating your timeframe .)
- Meet with your CEO or Senior Manager to gain their support for the giving moment

TARGET DATE

COMPLETED

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6 WEEKS before kickoff

- Request employee import file form (for digital only) from United Way Annual Giving Manager
- Finalize goals & strategies with your CEO and campaign team
- Lay out campaign plan (dates, theme, events, incentives)
- Assign tasks to your team (communications, event coordination)

TARGET DATE

COMPLETED

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4 WEEKS before kickoff

TARGET DATE

COMPLETED

- Notify your United Way Annual Giving Manager of the campaign materials you will need
- Schedule workplace presentations with your United Way Annual Giving Manager

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2 WEEKS before kickoff

TARGET DATE

COMPLETED

- Create energy and awareness and begin to publicize your Annual Giving Moment
- Prepare your CEO video, email, or letter to your employees

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1 WEEK before kickoff

TARGET DATE

COMPLETED

- Send CEO video, email, or letter to your employees
- Review event kickoff with your giving team
- Continue to promote your giving moment

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KICKOFF Week

TARGET DATE

COMPLETED

- Host your company-wide annual giving moment kickoff event
- Present information about United Way to all employees in presentations, emails and staff meetings
- Distribute pledge forms to all employees (for paper pledge giving moments)
- Be available to your giving team and employees to answer questions
- Continue building awareness and growing enthusiasm
- Thank your CEO for his/her support

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ANNUAL GIVING MOMENT Wrap-up

TARGET DATE

COMPLETED

- Collect all pledge forms (for paper pledge giving moments)
- Announce your final giving moment results
- Thank every employee for their contribution, again (such as verbal recognition, letter, email, small gift, celebration event, etc.)
- Conduct a giving moment debrief with your team and UWST annual giving manager. Develop a written summary for next year's giving moment
- Start planning dates for year-round engagement meetings, Day of Action, volunteering, etc.

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FREQUENTLY ASKED QUESTIONS

What does United Way do?

United Way of the Southern Tier fights for every person in our community to ensure students are learning and thriving, families have access to basic needs, and seniors are living safely in their own homes. We do this by assessing community conditions, investing in focused community impact goals and measuring results to create long-term change for generations to come.

How can I be sure my contribution is well managed and well spent?

United Way is committed to accountability and validation of our partner agencies through a rigorous vetting and application process. Knowledgeable, well-trained volunteers and experts from across our community carefully screen and select the programs funded by your contribution. The recommendations for funding are then reviewed and approved by our volunteer Board of Directors.

Why should I give to United Way and not directly to an agency?

When you give to a specific charity, you support a cause. When you give to UWST, your gift becomes part of a collective effort to strengthen our entire community. Your gift to United Way allows you to accomplish more than you can alone or through a single charity.

No other single organization has the scope, expertise, or influence to bring hundreds of human service agencies, government, education partners, and dedicated volunteers around a common vision of achieving long lasting results for a stronger, healthier Southern Tier.

Will the money I give to United Way go outside the community?

No. The money raised in the Southern Tier, Chemung and Steuben Counties, stays in Chemung and Steuben Counties, unless you, as the donor, request that it be sent to another United Way. Your local United Way does pay annual dues to United Way Worldwide, the trade association for United Ways. Those dues (which amount to less than one cent of every dollar given) represent the only money that leaves the Southern Tier. And those dollars eventually are returned to the community in services received.

Is my gift tax-deductible?

Yes, UWST is a federally registered 501c(3) not-for-profit corporation. Donations to United Way are tax-deductible to the extent allowed by an individual's or corporation's circumstances.

Are there other ways I can contribute to United Way?

There are three ways you can help. You can give. You can advocate. You can volunteer. Or you can do a combination of all three! Whether it's reading to children, helping with tax preparation, or delivering meals to homebound seniors, there are hundreds of volunteer options available every day.

Learn more about how to volunteer at www.uwstvolunteers.org.



HANDLING POTENTIAL OBJECTIONS

I already give directly to a charity.

Firstly, thank you for giving. Together we can accomplish more than anyone can alone or through a single charity. United Way is looking at the big picture — assessing community conditions, investing in focused goals and measuring results to create long-term changes. By giving through United Way, you are choosing to support the greatest need in the Southern Tier through program investments.

Times are tight. I don't have money to spare.

Every gift to United Way, no matter its size, provides vital services to people in our community who need our help. When you give, you join thousands of generous donors in Chemung and Steuben counties to create life-changing conditions for some. You may find that giving a small amount each pay period through payroll deduction allows you to make a pledge that fits your budget.

I feel pressured into giving.

Giving is a personal matter and decision. Neither United Way nor its volunteers believe people should be forced to give. Pressure defeats the very idea of voluntary giving. United Way counts on people to give because they understand the critical needs of our community and because they want to improve people's lives. Everyone should have an opportunity to give and to enjoy the emotional reward that comes from knowing you are part of building a stronger, healthier community. Only you can determine whether you want to give at this time.

I don't live in Chemung or Steuben County.

In today's world, people often have ties to more than one community. Each United Way serves a particular geographic region and is committed to fostering the healthy and vibrancy of that area. Through United Way's donor choice program, you have the option of designation your gift back to the community in which you live or you can split your gift to make a difference in both communities.

I heard about a financial scandal at United Way.

Every United Way is local and independent, including your United Way of the Southern Tier. A volunteer board of directors comprised of industry professionals and leaders in the Southern Tier makes decisions about investments for our region, and UWST has never experienced any financial abuse. Over 20 years ago, a former United Way of America president, William Aramony, and two associates, were indicted for misusing funds. Neither United Way as an organization, nor any local United Ways, were charged with any wrongdoing in this matter. United Way instituted major governance and structural changes, and has become a model of accountability in the non-profit sector. Forbes magazine has since named United Way among the top five all-star charities for financial efficiency.

