A NOTE FROM OUR CHIEF EXECUTIVE OFFICER

Dear Employee Campaign Coordinator,

Together, we will overcome this health and economic crisis.

We don’t do our work alone. We are in this together, and it’s the strength of our community partners that drives real change. Improving our community and the lives of our residents does not happen in a single moment—it happens in multiple moments created by thousands of people. By running your organization’s employee giving campaign, you are about to create a moment in your organization where your co-workers can be a part of providing your neighbors with opportunities to thrive.

United Way Bay Area remains unparalleled in our power to convene partners, providers, and resources to address the needs of communities in crisis. This is even more important now. We’ve been responding to local needs and society’s most pressing problems for more than 98 years. COVID-19 recovery is a new challenge for us; but UWBA was built for this. We have created two COVID-19 Relief Funds to shore up food pantries, emergency-relief programs, expand our 211-support line and help those in need of housing assistance, food and other basic needs.

A critical need of helping communities recover is accomplished by the work UWBA does every day through our programs. UWBA’s essential work includes:

• Helping feed those facing food insecurity; Emergency Assistance Network (EAN)
• Preparing youth for success in school, work and life through On Track career exploration
• Connecting those in financial distress with resources to pay bills and stay in their homes; Earn It! Keep It! Save It! tax sites (EKS) and SparkPoint financial centers
• Connecting 66,200+ people to services and programs like food pantries, rental assistance, legal help or meal delivery through our 211 service

Your leadership of this workplace campaign will provide the critical support we need to build our community of change-makers so that together we can end the cycle of poverty for struggling Bay Area residents and families.

This booklet, along with other resources found on uwba.org, will help you run a successful campaign so that you can inspire your team to join you in making their moment for the good of us all.

Welcome to the United Way team!

Sincerely,

Kevin Zwick
Chief Executive Officer
United Way Bay Area
Thank you for serving as an employee campaign coordinator (ECC) for the 2020 United Way Bay Area Campaign! As an ECC, 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 in building a stronger, healthier Bay Area.

Whether you are a first-year employee campaign coordinator or a veteran, the information in this guide will help you plan and execute a smooth – and successful – UWBA campaign. We encourage you to take advantage of the materials we’ve provided and know that your UWBA relationship manager is always ready to support you in any possible way.

Thank you again for joining our UWBA team.

Together, we can fight for every person in our community.

This guide will assist you in making this year’s campaign an exciting and impactful experience for your organization and its employees.

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If you need campaign materials or assistance getting your campaign off the ground, call us at 415.808.4265.
WHAT DOES UNITED WAY BAY AREA DO?
OUR MISSION IS TO CREATE POVERTY-FIGHTING PROGRAMS THAT SCALE AND DRIVE IMPACT.

We are a catalyst that inspires people to invest in each other to strengthen and transform our communities.

United Way Bay Area is working to develop vibrant communities where people gain the knowledge and ability to build careers, afford homes and thrive financially.

United Way Bay Area activates individuals and organizations to break the cycle of poverty in the Bay Area by building financial capability among residents. We are fighting to remove barriers to success and improve lives.

WE SERVE THE COMMUNITY IN 3 KEY ROLES:

1. **Innovative collaborator:** UWBA is the hub of a network of nonprofit, business and government agencies fighting poverty in the Bay Area. We continuously develop new ways to connect and support these organizations to maximize their impact and help residents plug into the services they need.

2. **Fundraiser and investor:** Funds collected by UWBA are invested in local nonprofit organizations that address the most pressing needs of our communities and make the most impact.

3. **Advocate in the fight against poverty:** UWBA serves as a trusted, unifying voice of the community. We advocate for equitable opportunity and whole-family financial stability through a two-generation approach to fighting poverty. UWBA simultaneously connects kids and their parents to programs that help them develop skills for success.

For more information on United Way Bay Area’s own poverty-fighting initiatives, visit: uwba.org
RUNNING A SUCCESSFUL CAMPAIGN

SELECT A STRONG CAMPAIGN TEAM
Your best team will have broad representation from all departments and levels.

- Involve team members by handing out assignments and divvying up roles.
- Have an executive sign on to the team to help secure resources.
- Have team members set goals for their departments and assist in deciding how best to engage peers. It doesn’t have to be one size fits all.

CONNECT GOALS TO IMPACT
Goals inspire! Start with the most important goal: the positive impact your successful campaign will have on our community.

- Set a company-wide goal.
- Connect your campaign to real results. For example, for every $1,000 dollars raised, we help connect 50 individuals with essential community services to access food, shelter, counseling and more. Go to uwba.org/donate for more examples.

PARTICIPATION EQUALS SUCCESS
It’s a simple equation. The more people that sign up, the bigger the difference you will make and the more you will have to celebrate! Aim high and find fun and creative ways to engage your colleagues.

- Invite a United Way speaker. We are always ready to talk to your employees about how giving impacts our community. We can do this in a virtual environment as well.
- Make your gift first - your leadership and commitment will inspire others to join you.
- Highlight United Way leadership groups such as Emerging Leaders for young professionals and Women United, as well as, our year-round volunteer opportunities.
INVOLVE COMPANY LEADERSHIP

Don’t hesitate to ask your leadership team to get involved. They can inspire others to give by leading the way.

• Ask your leadership team to set aside 5-10 minutes for a United Way speaker at a staff meeting.
• Invite your leadership team to run a “pacesetter” campaign and make their personal gift and corporate commitments prior to your campaign launch.
• Ask your leadership team to visibly support the campaign via email and by speaking at kickoffs and events.
• If your workplace includes union members, invite union leaders to participate and provide their support as well!

CORPORATE PARTICIPATION

These days, many corporations have community investment priorities. Ask your United Way representative to help you build out a corporate engagement strategy that could include:

• An employee gift-matching program.
• Local and national corporate grants for United Way’s poverty-cutting programs.
• Virtual volunteer opportunities for employees.

PUBLICITY AND COMMUNICATION

Advertising events and campaign dates early, often and everywhere will make a difference. Whether it’s a poster in the break room, speeches at staff meetings, inspiring emails or messaging on your office intranet, United Way can provide you with all the tools you need.

• Make use of United Way videos, digital resources and messaging.
• Tailor the sample letters, emails and other goodies available at uwba.org/campaign-resources.
• Utilize your company’s internal communication channels to amplify the awareness and engagement for the campaign.

ADDITIONAL SUPPORT

We are so thankful for your efforts and want to do everything we can to help you run a great campaign. Here are a few additional resources we can provide:

• A member of our Development Team can help get your leadership team more involved in your campaign.
• Remember, access to videos, training materials and sample communications are also right at your fingertips. Learn more at uwba.org/campaign-resources.
4 KEY WAYS

ENGAGE YOUR COLLEAGUES DURING THE CAMPAIGN

1. **Host a virtual campaign kick-off** with one of United Way's program sites to showcase the poverty-fighting work you are supporting.

2. **Create teams to encourage friendly competition and boost morale.** For instance, offer rewards for reaching goals based on office geography, department, individual, etc.

3. **Encourage your in-house clubs and groups to help spread the campaign message to their members.** For example, run a campaign video contest about supporting the movement to end the cycle of poverty in the Bay Area.

4. **Host a virtual volunteer activity** for employees to gain perspective on how their gift will be put to work.
“IN MY VALUE SYSTEM, SUCCESS IS DEFINED BY THE NUMBER OF LIVES ONE POSITIVELY IMPACTS.”

- Oscar Alvarez
  Member, Emerging Leaders
Use this list to stay organized and on track for running an exceptional campaign.

Insert completion task date for each bulleted task:

8 WEEKS BEFORE CAMPAIGN KICKOFF

☐ Meet with your United Way Relationship Manager (RM) to review past performance and explore upcoming campaign themes and materials.  

☐ Develop campaign goals and identify opportunities and challenges. Draft strategies to meet these goals and improve on last year’s results.  

☐ Determine company pledge entry method: Digital Giving, Paper Pledge Forms, or Both  

☐ Determine campaign start and end dates. The most effective campaigns are best 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 campaign.  

☐ Review and approve your budget.  

☐ Recruit a campaign team representing key departments and all levels of your company. Educate your team members on United Way’s role in the community

6 WEEKS BEFORE CAMPAIGN KICKOFF

☐ Deliver employee import file (for digital campaigns only)  

☐ Finalize goals and strategies with your CEO and campaign team.  

☐ Lay out campaign plan (dates, theme, events, incentives).  

☐ Assign tasks to your team (communications, event coordination).  

4 WEEKS BEFORE CAMPAIGN KICKOFF

☐ Notify your RM of the campaign materials you’ll need.  

☐ Begin your Leadership campaign. See page 15 for more information on Leadership campaigns.  

☐ Schedule impact experiences and workplace presentations with your RM.
2 WEEKS BEFORE CAMPAIGN KICKOFF

☐ Create energy and awareness. Begin publicizing your campaign.
☐ Prepare your CEO video, email or letter to your employees.
☐ Identify 3-5 testers for digital campaigns only

DATE

___ / ___ / ___

1 WEEKS BEFORE CAMPAIGN KICKOFF

☐ Send CEO video, email or letter to your employees.
☐ Review event kickoff with your campaign team.
☐ Continue publicizing your campaign.

DATE

___ / ___ / ___

CAMPAIGN KICKOFF WEEK

☐ Host your company-wide campaign kickoff event.
☐ Present information about United Way to all employees in presentations and staff meetings.
☐ Distribute pledge forms to all employees (for paper pledge campaigns).
☐ Be available to your campaign team and employees to answer questions.
☐ Continue building awareness and growing enthusiasm.
☐ Thank your CEO for his/her support.
☐ Thank every employee for participating in the campaign.

DATE

___ / ___ / ___

POST CAMPAIGN WRAP-UP

☐ Collect all pledge forms (for paper pledge campaigns). Ask your campaign team to follow up with colleagues who may not have returned their forms. Collecting forms from every individual, regardless of if they gave or not, will confirm that every employee had the opportunity to give.
☐ Announce your final campaign results.
☐ Thank every employee for their contribution, again. Ex.) verbal recognition, letter, email, small gift, celebration event, etc.
☐ Conduct a campaign debrief with your team and RM. Develop a written summary for next year’s campaign.
☐ Consider additional opportunities to increase employee morale. Ex.) Day of Caring, Gatekeeper training, volunteering

DATE

___ / ___ / ___
What does United Way do? United Way Bay Area is working to develop vibrant communities where people gain the knowledge and ability to build careers, afford homes and thrive financially. UWBA activates individuals and organizations to break the cycle of poverty in the Bay Area by building financial capability among residents. We are fighting to remove barriers to success and improve lives. UWBA serves the community in three key roles: innovative collaborator, fundraiser/investor and advocate in the fight against poverty.

Where does the money go? UWBA leverages continuous research and program evaluation to identify the most pressing needs of people in our community. Our priorities and strategies are aligned to launch, facilitate and scale programs that meet these needs while inspiring donors to take action through giving and volunteering.

What financial safeguards are in place at United Way? UWBA is committed to the highest standards of accountability and transparency when investing donor dollars. As a matter of practice, no single staff member is able to process any transaction from start to finish and all checks must be signed by two authorized signers. The Finance Committee and Board of Directors review financial statements quarterly to ensure adherence to the budget. An independent accounting firm audits UWBA once a year and the Audit Committee and Board of Directors must review and approve this audit each year.

Why should I give to United Way Bay Area and not directly to an agency? 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 Bay Area. When you give to a specific charity, you support a cause. When you give to UWBA, 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.

Why isn't my favorite non-profit funded by United Way? In some cases, an agency may be doing great work, but it may not have programs that align with United Way’s community impact goals. In other cases, the agency may not meet United Way’s rigorous criteria for performance and accountability. Even though UWBA raised more money last year, there were nearly double the requests for funding than available funds.

Will the money I give to United Way go outside the community? No. The money raised in the Bay Area stays in the Bay Area, 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, and also to United Ways of California, the state trade association. Those dues (which amount to less than one cent of every dollar given) represent the only money that leaves the Bay Area – and those dollars eventually are returned to the community in services received.

Is my gift tax-deductible? Yes, UWBA is a federally registered 501(c)(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 to contribute. You can GIVE. You can ADVOCATE. You can VOLUNTEER. Or you can do a combination of all three! Whether it’s reading to children, leading financial literacy classes for hard-working families, or delivering meals to homebound seniors, there are many volunteer opportunities available.