



**A Guide to Having Fun and
Raising Money During Your
Workplace Campaign!**



**United Way
of the Lakeshore**

THANK YOU!

Dear Friends:

As a proud Muskegon native, and part-owner of Tyler Sales Company which has been an active part of the Muskegon community since 1934, I look forward to working hand-in-hand with all of you during this year's United Way of the Lakeshore campaign as we unite to inspire positive change! Our company adheres to the Anheuser-Busch credo "Making Friends is our Business", which aptly applies to the United Way's legacy of enhancing the quality of life for all of our friends, the residents of Muskegon, Newaygo and Oceana counties. In 2020, United Way of the Lakeshore invested \$2.5 million in programs and services to communities throughout all three counties, providing support to more than 100,000 of our friends!



I'd like to thank all of you for the commitment you've made to be an active part of the United Way of the Lakeshore's campaign for this coming year. As we embark on this year's campaign let us all be reminded that our collective efforts will produce long-lasting benefits throughout Muskegon, Newaygo and Oceana counties by providing residents with resources to address short-term need, educate youth and build thriving communities. United Way's focus on Education, Income and Health are the building blocks for a good quality of life which enhances opportunities for all.

As local communities continue to recover from the impact of COVID-19 there will be many additional needs which makes our efforts more important than ever. We can all take great pride in knowing that we are doing our part to make our local communities stronger by rallying support of the United Way. By working together we can make a positive difference and create lasting change to help all of our friends thrive throughout Muskegon, Newaygo and Oceana counties!

Cheers to you all!!

Tom Schultz
Campaign Chair, United Way of the Lakeshore
Tyler Sales Company, Inc. – Vice President



TABLE OF CONTENTS

United Way Board, Staff, Committees.....	4
Community Solutions.....	5-7
Volunteer Engagement.....	8
Campaign Overview.....	9
Strategies for Success.....	10-11
Campaign Planning Sheet.....	12
20 Minute Meeting Guide.....	13
Best Practice Pacesetter Campaign.....	14
Leaders United.....	15
Everyday Heroes.....	16
Labor United.....	17
Things to Keep in Mind.....	18
Glossary of Terms.....	19
Job Descriptions.....	20-21

UNITED WAY OF THE LAKESHORE BOARD & STAFF

The Board and Staff of United Way of the Lakeshore appreciates your commitment to our mission to 'Unite to Inspire Change and Build Thriving Communities'. We are here to support you and your campaign!

BOARD OF DIRECTORS

GARY NELUND, Board Chair, State Farm Insurance, City of Norton Shores

KATHY MOORE, Vice-Chair, County of Muskegon Public Health Department

STACY MELLEMA, Treasurer, Hungerford Nichols

WALTER J. CHRISTOPHERSEN, Secretary, IBEW Local #175

RYAN BENNETT, UA Local #174 West Michigan Plumbers, Fitters & Service Trades

SHAWN BUCKNER, Meijer

TAMICA FOX, ADAC Automotive

MARTHA GABRIELSE, Retired JP Morgan & Chase

ERIK GENTZKOW, Cannon Muskegon

STACY GOMEZ, CALL 211

POPPY HERNANDEZ, State of Michigan

BRAD HILLEARY, Webb Chemical & Trace Analytical Labs

DJ HILSON, County of Muskegon

RICH HOUTTEMAN, Consumers Energy

BRENDA K. JACOBS, Brickley DeLong PC

STEVE JACKSON, Jackson-Merkey Contractors

ERIN KUHN, West Michigan Shoreline Regional Development Commission (WMSRDC)

LORI LITTLE, Gerber Federal Credit Union

JILLIAN MELOCHE, Nowak Machined Products

MIKE REYNOLDS, CWC Textron Castings

LISA SABOURIN, Employers Association of West Michigan

JOHN SCHAUB, Howmet Aerospace

TOM SCHULTZ, Tyler Sales Co., Inc.

JOHN SEVERSON, Muskegon Area Intermediate School District

PAT SHAFER, Retired Chamber of Commerce

JIM STEFFEL, Warner Norcross + Judd LLP

KIM SUAREZ, Retired Priority Health

KAY WILLIAMS, Retired, Community Volunteer

JONATHAN WILSON, DTE Energy

CHRIS WREN, Newaygo County

STAFF

CHRISTINE ROBERE, President and CEO

christine@unitedwaylakeshore.org

Direct: (231) 332-4001; Cell: (231) 740-7414

BARBARA SAUNDERS SIMS, Oceana County Director

barbara@unitedwaylakeshore.org

Direct: (231) 332-4005

JIM RYNBERG, Newaygo County Director & Mayor of Fremont

mayor@cityoffremont.net

Office Only: (231) 225-0318

DOMINIQUE BUNKER, Community Engagement Director

dominique@unitedwaylakeshore.org

Direct: (231) 332-4006; Cell: (231) 760-9993

WYNEICE HAIRSTON, Community Impact Director

wyneice@unitedwaylakeshore.org

Direct: (231) 332-4017; Cell: (231) 557-0112

LYNN KEECH, RSVP Manager

lynn@unitedwaylakeshore.org

Direct: (231) 332-4016; Cell: (231) 683-6893

STEPHANIE LADEGAST, Executive Assistant & Operations Manager

stephanie@unitedwaylakeshore.org

Direct: (231) 332-4000

KATHY SAYLES, Child Care Development Coordinator

ksayles@unitedwaylakeshore.org

Direct: (231) 332-4014; Cell: (231) 286-6512

JANA ROUTH, AFL-CIO Labor Engagement Director

jana@unitedwaylakeshore.org

Direct (231) 332-4004; Cell: (231) 638-2741

KARA ZIELINSKI, Resource Development Director

kara@unitedwaylakeshore.org

Direct: (231) 332-4003; Cell: (231) 670-1513

COMMUNITY SOLUTIONS

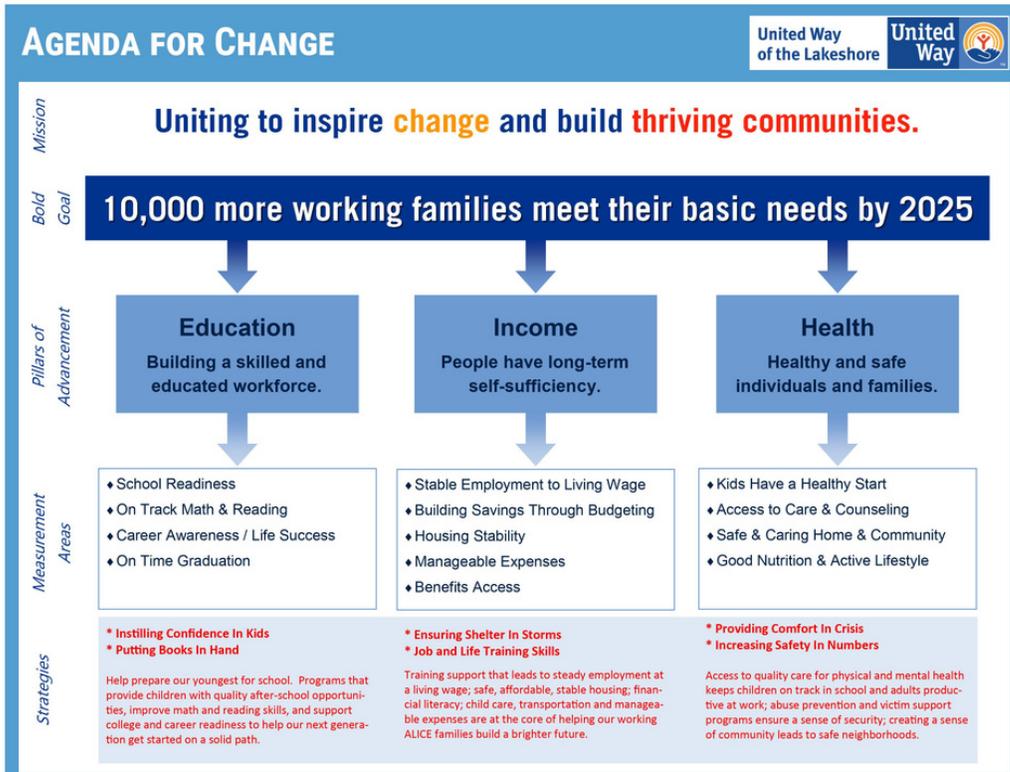
United Way’s work is to identify, launch and participate in community problem-solving initiatives. We help more than one person or one charity by magnifying the investment of many in the community to create positive, measurable change.

COMMUNITY INVESTMENT PROCESS

Advancing the common good begins by recruiting dedicated volunteers from our community who are passionate and knowledgeable about the community needs. After extensive training, these volunteers begin the community investment process. Trained volunteers are asked to donate approximately 15-20 hours to read applications and proposals for funding of programs and compare requests to strategies that align and bridge service of needs in our counties.



Volunteers review partner agencies to make sure each is financially sound, effective and efficient, and that the organization has the capacity and infrastructure to achieve desired outcomes. They then make sure that proposals make a significant impact on our progress toward helping 10,000 more working families meet their basic needs by 2025. Funding is based on proven results demonstrating that the program can make the most difference in improving the quality of life for those in need in our communities.



AGENDA FOR CHANGE

While we focus our efforts on addressing gaps in service for working families as shown in the **Agenda for Change** (left), being the “community safety net” will always be a major role of United Way. We will continue to provide for those with critical needs, whether it is food, shelter, transportation or physical or mental health related issues, as well as invest in quality prevention and enrichment programs.

Uniting to inspire change and build thriving communities. **GOAL:** help 10,000 more working families meet their basic needs by 2025.

COMMUNITY SOLUTIONS

COMMUNITY PROGRAMS AND INITIATIVES

Along with investing in partner programs, United Way has also been brought to our community several programs that are improving lives and inspiring change.



2-1-1 is a 24-hour, 7-day a week information and referral line. Service areas include Muskegon, Oceana and Newaygo counties. In 2015, 2-1-1 took more than 42,000 calls in Muskegon, Oceana, & Newaygo counties. The top requests were for utility bill payment assistance, food assistance and housing expense help.

Lights on Afterschool celebrated its fifteenth year in 2020, serving students in six sites in Muskegon County. More than 400 students enjoyed reading time, homework help, arts, healthy snacks, science, physical activity, and more. Funders include Howemet Foundation and Gerber Foundation.



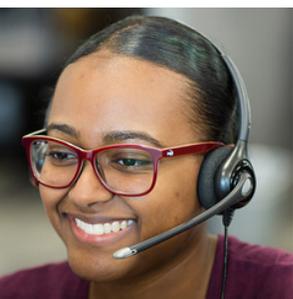
Dolly Parton's Imagination Library - United Way Affiliate is committed to ensuring that children enter school ready to succeed. This new program allows families with children ages 6 months to 5 years old to receive free monthly home delivery of age-appropriate books to encourage reading at home. The program currently serves families residing in Holton and Muskegon Heights School Districts and with additional support will be expanded to other areas.

Student United is a United Way initiative for high school students. It is designed to teach students the importance of the United Way and engage students in service, thus creating our next generation of volunteers and teach leadership and program development skills. Members have worked with Kids' Food Basket, tutoring students at Edgewood Elementary in Muskegon Heights, planned Youth Day of Caring, and many other projects.



Retired Senior Volunteer Program (RSVP) is a national service program hosted by United Way of the Lakeshore for the benefit of our community. The program places over 100 senior volunteers in 20 nonprofit sites to further health, economic development, education, and cultural opportunities in our community.

United After Work is our group for retirees who still want to Live United, which meets monthly at the United Way office. Retirees can: **GIVE** an annual gift through a one-time donation or monthly or quarterly auto-pay; **ADVOCATE** for the needs of our community by helping to inform others of our work; **VOLUNTEER** on a regular basis or at a one-time event.



Uniting to inspire change and build thriving communities. **GOAL: help 10,000 more working families meet their basic needs by 2025.**

COMMUNITY SOLUTIONS

HOW WE LIVE UNITED

The following are examples of how Living United impacts our communities. These programs and others are made possible through the generosity of the community and the support of United Way.

EDUCATION: THE CORNERSTONE OF SUCCESS



Three outstanding Scouts were able to achieve the highly acclaimed Eagle Scout Award and together they volunteered a total of 332 hours of community service directly impacting Muskegon County. Robert built a hammock village in order to provide a place of tranquility for his community. Spencer in Muskegon installed shelving in his local elementary school to create a space for a music library. Brandon in Norton Shores saw the need at the beautiful Hoffmaster Park to repair and replace the staircases at the park so that all community members can enjoy this destination no matter their physical ability or limitations. These Scouts were able to display the aims of the Scouting movement by applying their gained sense of leadership, character, and citizenship skills.

INCOME: STRIVING FOR FINANCIAL STABILITY



The Eviction Prevention Program allows families the relief of stable housing and allows children to stay in their school and close to family and friends. Sarah is a recipient of this program. She is a single mother of three boys, was employed at a local manufacturer, and going to medical school. Sarah was nearly finished with schooling and was soon about to be able to provide better for her new children but lost her job due to COVID. She then was facing possible eviction that prevented Sarah from this advancement. Sarah entered the EPP program and presented a new job opportunity in her field of study, and things were looking up. Due to Sarah's lack of income and with the start of new employment, Sarah was eligible for the MSHDA "Emergency Shelter Grant." This grant helped Sarah become current on her rent! This program has helped keep a roof over their heads as Sarah transitions to completing her schooling and new profession. The EPP program is a much-needed program in our community to keep hard-working families just like Sarah in their homes. It has been a proven life changer for our families!

HEALTH: ENSURING A HEALTHY AND SAFE COMMUNITY



The AgeWell Senior Transportation Service is demand response, door to door, countywide non-emergency medical transportation service for Muskegon County's low-income seniors. Their objective is to allow seniors the ability to age in place and still receive medical care.

"Please share with all of your wonderful employees, volunteers, and donors, how much it means to people like me to have this wonderful service. Without your help, my life would be far more difficult. I began losing my vision several years ago. Then, in 2012, my husband passed on. I'm not ready for assisted living, and now because of you, at the age of 80, I'm able to continue to live independently. I don't know how I would get to my medical appointments without your help. I have no family here, taxi services are incredibly costly, and imposing on friends and neighbors would be asking too much. The people who schedule my transportation and the volunteer drivers are treasured friends. I've met so many wonderful, caring and interesting people associated with the Senior transportation program. You all are a true blessing to me. God Bless - Sheree

VOLUNTEER ENGAGEMENT

As a part of our commitment to create strong, healthy communities, United Way of the Lakeshore offers unique and rewarding volunteer opportunities for community members.

VOLUNTEER CENTER

The United Way Volunteer Center connects people to programs and talented volunteers to rewarding experiences through our GetConnected database of volunteers and opportunities. The Volunteer Center also connects nonprofit professionals to training and resources to develop their valuable human resources.

There is something to fit everyone's interest! **Get connected to an opportunity that is right for you at volunteer.unitedwaylakeshore.org**

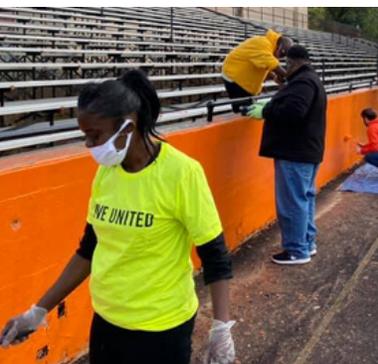
UNITED WAY VOLUNTEER OPPORTUNITIES

United Way's impact relies on the commitment and skills of its volunteers. Consider how you might best help us build a thriving community:

- Affinity Group Membership:** United After Work, Women United, Young Leaders Circle, Student United, Mission United, Labor United
- Campaign:** Cabinet, Loaned Executives, Presenters
- Committee Membership:** Communications, Finance, Facilities, Engagement, Community Impact, RSVP
- Community Investment:** Application and Agency Review
- Community Representation:** Parades, Events, Coalitions
- Event Support:** Annual Celebration, Ride United, Golf United

DAY OF CARING

Each year, hundreds of volunteers gather for a day of service to our community. Known as Day of Caring, our event is a favorite tradition for the collective spirit of good in our community. This year, on **September 10, 2021**, we will be working on various projects including veteran homes, local parks, agencies, and watershed clean-ups!



Uniting to inspire change and build thriving communities. **GOAL: help 10,000 more working families meet their basic needs by 2025.**

THE WORKPLACE CAMPAIGN

United Way's Workplace Campaign supports local community-building programs. This is an opportunity for companies to run one fundraising drive that will help the entire community.

CAMPAIGN OBJECTIVES

- Promote opportunities for employee involvement through workplace campaigns, volunteer programs, special events, etc.
- Boost employee morale and personal satisfaction. According to a study by United Healthcare, employees who are given the opportunity to support community through their work report feeling better about their employer and have strengthened bonds with co-workers.
- By providing opportunities for employees to lend a helping hand and contribute to charitable causes, workplaces can help foster their own sense of community.
- Raise the maximum dollars for the purpose of driving results in health, education, and financial stability through investments in local health and human service programs that help working families succeed and provide basic needs to those most at-risk.
- Deepen and broaden the base of community support by cultivating and developing relationships at the workplace and with individuals that creates a better understanding of United Way.
- Better recognize and involve the ideas, energy, and partnerships with individual company coordinators.
- Promote, encourage and recruit companies to implement best campaign practices and techniques.
- Explore, cultivate and develop existing and new markets.
- Increase thank you opportunities for those companies who increased and/or are working to do even better.
- Increase the number of persons involved in Leadership Circle and Everyday Hero Programs.

CAMPAIGN TIMELINE

MAY–JUNE: CEO visits by United Way staff and Campaign leadership

JULY/AUGUST: Campaign and division goals set; Pacesetter campaigns selected; Loaned Executives trained

JULY: Pacesetter Campaign Coordinators training

AUGUST: Pacesetter campaigns run

AUGUST/SEPTEMBER: Employee Campaign Coordinators Training

SEPTEMBER 10: Day of Caring—Muskegon County

SEPTEMBER–NOVEMBER: Workplace campaigns run

NOVEMBER: Year –End Appeal to individual non-workplace donors

DECEMBER: Giving Tuesday online giving campaign

JANUARY: Campaign Wrap Up and reporting



STRATEGIES FOR SUCCESS

We invite you to incorporate as many of these best practices as possible in your workplace campaign. Follow these “**Eight Steps for Success**” and you have a greater chance of achieving your campaign goals.

1. CEO Support and Involvement

- Pledge a company gift (if applicable).
- Commit to holding employee meetings.
- Make a personal contribution.
- Visibly and actively support the campaign.

2. Recruit a Capable, Committed Campaign Team

- Include one person from each department on your committee.
- Involve labor representatives, if applicable.
- Participate in United Way Employee Campaign Coordinator training sessions.

3. Set an Aggressive Campaign Goal/Track Results

- Analyze past performance.
- Set an ambitious goal that stretches your team. Goals can include total dollars raised, percent participation, and/or Leadership goals.
- Advertise goal; track and report progress regularly.

4. Work with United Way to Develop a Campaign Plan

- Meet with your Loaned Executive to help you plan.
- Use United Way campaign tools and materials posted on our website.
- Secure raffle items or incentives for the campaign.
- Plan special events to create enthusiasm and raise funds.

5. Conduct a Leadership Giving Program (Gifts of \$500 or More)

- Conduct a Leadership Giving breakfast or meeting.
- Set specific Leadership Giving goals.
- Ask senior management to be Leadership Givers.
- Discuss Leadership Giving at all-employee meetings.
- Provide special recognition for Leadership Giving.

6. Hold Meetings for All Employees

- Schedule 20 to 30-minute meetings to reach all employees.
- Provide food, door prizes, and incentives for giving.
- Include the campaign video or a speaker from a United Way partner.
- Ask an employee to share a story about their experience with United Way.
- Educate everyone about the positive changes their gift makes in the community.
- Follow up with all employees.

7. Promote Your Campaign

- Build United Way awareness.
- Ask everyone to give.
- Have fun!

8. Thank, Recognize, and Report

- Post internal thank you messages: signs, articles, and banners.
- Publish an internal roster of Leadership Givers and Loyal Contributors.
- Report results to United Way and employees.
- Conduct campaign debrief with United Way and your Loaned Employee.

Keep In Mind...

Ninety percent of your time is spent planning and organizing your campaign and only 10 percent is spent running it.

Try to include the informal leaders of your company. These people already have the respect and trust of their co-workers and will be influential when it counts.

For all electronic campaigns, we suggest that you still include fun activities and an employee rally/kickoff with a guest speaker and a United Way video presentation.

Have a year-round campaign! Hold special events several times a year rather than several during one week. It's easier to ask people to contribute small amounts over the course of a year. Check the special event section in your campaign materials.

Keep a notebook or file of your plans for next year. You or your successor will be glad you did!

When people are asked why they did not give, the response usually heard is... “I was never asked!”

STRATEGIES FOR SUCCESS

Possible Hesitation:

"Employees already give so much."

Answer: "That's great! It means they understand the importance of supporting the entire community."

Strategy:

- Make sure everyone is educated about United Way and our programs and initiatives. Services are available to all of Muskegon County.
- Don't be afraid to make an ask. Most employees expect it and are ready to give.
- Be sure to thank your employees for their entire contribution to our community, whether it is time or financial support. They should feel really good about all they do.

Possible Hesitation:

"We have a small budget/no budget."

Answer: "With a little creativity, a campaign can be fun and successful without any budget at all!"

Strategy:

- Use experiences instead of items as incentives.
- For instance, ask your CEO to provide dinner at his or her home for the winner of a drawing, or have the senior team wash the cars of drawing winners.
- Hold a potluck kickoff, where each person who wants to participate brings in a dish. Departments can put on skits for each other, making the kickoff quite entertaining!

Possible Hesitation:

"We have fewer employees than last year."

Answer: "We know there can be many changes in a workforce and we are there to support you and your employees."

Strategy:

- Share success stories. They can be inspiring and motivating to your employees.
- Make it a competition. Look at individual departments and challenge them. You'll be surprised how competitive it can get.
- Promote payroll deduction. On average, a contributor who gives through payroll deduction will give four times more than a cash or check.

Possible Hesitation:

"We have the same number of employees but still have low participation."

Answer: "This is a common challenge among many types of organizations, large and small."

Strategy:

- Instead of asking just during campaign time, hold fundraisers throughout the year. You can build morale and support the community.
- Communicate senior management support. Have CEOs share why they support United Way.
- Hold a special Leadership Giving meeting for potential givers. A targeted Leadership Giving campaign can increase your participation and per capita giving rates.

Possible Hesitation:

"I have no time to dedicate to campaign."

Answer: "Whew! Chances are, you wear many hats. That's one of the reasons why you're so special to us!"

Strategy:

- We've created a special event guide with activities, incentives and themes for you. The activities are broken down by the amount of time and energy needed, cost and purpose (such as fundraiser or team building).
- There are many other materials to help you run a successful campaign. Check out the campaign toolbox on our website.
- Our staff and Loaned Executives are here to help!

Possible Hesitation:

"We have multiple locations/shifts."

Answer: "Multiple locations and/or a non-office environment can sometimes be a challenge. Proper planning can help."

Strategy:

- Create a campaign committee with a person from each location/department. They should also help with planning and solicitation.
- Don't leave anyone out. Host a fundraiser that everyone can participate in like a bake sale, used media sale or a jeans day.
- Try holding separate events for different locations/ shifts. Make sure they receive all necessary materials.

Don't Forget To...

- build a timeline with a start and end date.
- set an aggressive goal and track results.
- hold a kickoff rally with a speaker.

- ask everyone to give.
- include United Way staff/LE in your planning.
- have fun!

MYTH BUSTERS

United Way is Just a Middleman

Donations made to United Way's Impact Fund make the greatest difference and help the most people. United Way monitors the results to ensure the programs are making an impact. You can be certain your money is well invested. In addition, your donation may qualify for matching funds, increasing the investment even more.



United Way has High Overhead Costs



United Way operates at an extremely high rate of efficiency. More than 82% of every dollar raised is invested into solving community problems. This greatly exceeds the minimum standard of 65 cents which is required for a nonprofit to be considered efficient and living up to its mission. Independent nonprofit monitoring groups like Charity Navigator and the Better Business Bureau give United Way of the Lakeshore high marks in terms of efficiency year after year.

Local Dollars are Spent Nationally

As part of a network of 1,800 local and independent United Ways, United Way of the Lakeshore receives services and support from United Way Worldwide. However, dollars raised in our three county region stay here. United Way of the Lakeshore has its own 501(c)(3) certification and is governed by a local board of directors who oversee annual investments from the Community Fund.



CEO Compensation is Too High



An email circulated widely for several years, listing information about executive compensation and overhead costs at large nonprofits. That document contained erroneous information about United Way Worldwide CEO. It makes false claims about perks and overhead costs.

KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

1. Make a plan to include top management throughout the campaign.
2. Get help. Make a list of the people you have or will recruit to help with your campaign.
3. Set a goal for your campaign.
4. Get important dates on the calendar: Campaign start date, follow-up meetings, Campaign end date.
5. Determine if and how you will have fun with themes and/or special events.
6. Promote United Way. Make a list of your ideas for communicating the message and keeping people engaged.
7. Make the ask. Explain how associates will be given their pledge forms and how they'll be asked to turn them in.
8. Track and report results.
9. Thank and recognize donors and committee members.



Uniting to inspire change and build thriving communities. GOAL: help 10,000 more working families meet their basic needs by 2025.

KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

20 MINUTE MEETING GUIDE

Group solicitation is the most effective and efficient technique for increasing employee contributions. Whenever possible, incorporate the United Way presentation into an existing staff meeting. As employees enter the meeting, present them with United Way pledge forms and brochures. Follow up with those who were unable to attend.

TOPIC	ASSIGNED TO:	TIME ALLOATED 20 MIN. MEETING	TIME ALLOATED 15 MIN. MEETING	PURPOSE
Welcome, Opening Remarks and Statement of Company Support	Employee Campaign Coordinator/ CEO	1 minute	1 minute	Welcome everyone and state purpose for the meeting.
United Way Overview	UW Representative	4 minutes	3 minutes	Thank them; explain how United Way works to advance the common good.
Statement of Labor Support (if applicable)	Labor Representative	1 minute	1 minute	Demonstrate Support
Testimonial of Agency Visit, Personal Experience or Agency Presentation	Company Employee, or Agency Speaker	4 minutes	3 minutes	Provides an example of United Way success stories
Campaign Video	UW Representative	4 minutes	4 minutes	Sets the tone for campaign
Ask for Support	Employee Campaign Coordinator	1 minute	1 minute	Solicits the support of individual donors
Closing Remarks and Thanks, Pledge Card Procedures and Collection	Employee Campaign Coordinator or United Way Representative	5 minutes	2 minutes	Express gratitude for their time and participation

TIPS FOR TOP ATTENDANCE & PARTICIPATION...

- Schedule meeting at optimal time; multiple shifts
- Have leadership make the ask to attend and to give
- Advertise and provide snacks and refreshments
- Encourage employees to complete pledge forms at meeting and collect them at that time
- Offer incentives for attending and for pledging
- Let your United Way staff and volunteers know how they can help



KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

PACESETTER CAMPAIGNS

Pacesetters kick off the United Way of the Lakeshore campaign in August, leading the community in spirit and in generosity.

Their early participation sets an example that shines throughout the community, with their leadership and financial commitment changing the way others approach their campaign.

Advantages to Pacesetters for participating include:

- Special recognition through special events and promotional publications.
- Member of a select group.
- Employees earn respect and build morale; pacesetter organizations are looked up to as leaders and people who care about their community. The teamwork developed will last long after the campaign ends.
- A fast, efficient, fun campaign, with experienced United Way professionals at their side from start to finish.

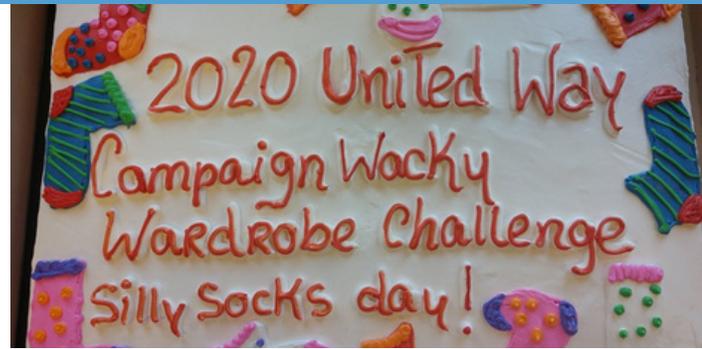
BEST PRACTICE PACESETTER CAMPAIGN: CANNON MUSKEGON

Cannon Muskegon leads the United Way Campaign as a Pacesetter, kicking off in August with employee lunches, competitions, raffles, special events and a dollar-for-dollar employee contribution match.

The Cannon team hosts an annual golf outing where all proceeds benefit United Way of the Lakeshore. They use this opportunity to engage outside vendors as sponsors and to host a day of fun for the employees. Last year's outing raised over \$32,000 alone!

The team also had a 74% participation rate in employee contributions in 2020. Ranking as one of the highest across all campaigns!

CANNON MUSKEGON KNOWS HOW TO LIVE UNITED!



KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

LEADERS UNITED

Leadership is a part of every aspect of our campaign and organization.

Leadership givers are those who have made the commitment to give at a level of \$500 or more annually. Leadership gifts traditionally make up nearly half of all campaign dollars.

Right person, right ask! United Way of the Lakeshore practices a philosophy of identifying the best person to make the leadership ask. Identify a leader in the recognized peer group of the prospect. In a company, this is often the CEO or other company thought leader.



RECOGNITION

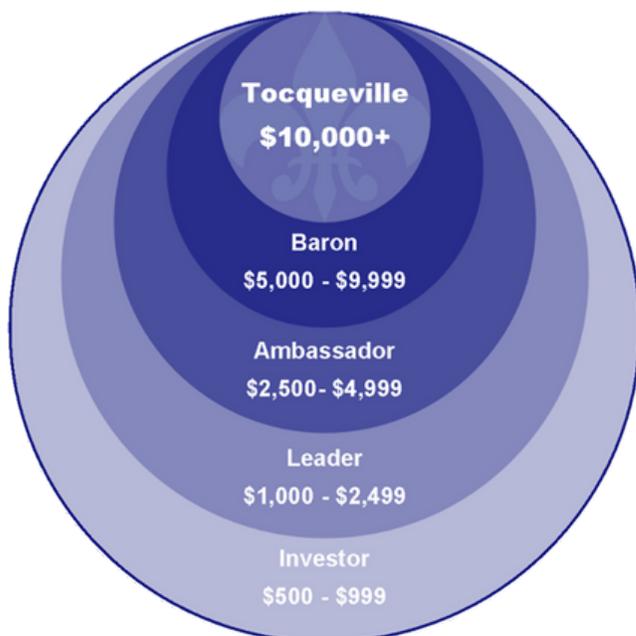
Community: United Way of the Lakeshore Annual Report includes the Leadership Giving roster by giving levels. Highlights of the Annual Report are shared in every meeting and presentation. The written report includes all Leadership donors.

Company: As part of campaign planning, CEOs are encouraged to recognize employee leadership donors for their commitment to community. This has included a special note or letter of appreciation. Some have held special luncheons or other gatherings. This thank you is our greatest tool for further growth of leadership giving.

Union: Organized labor assembles a statewide Labor Leads Directory to recognize United Way leadership donors.

RECOGNITION LEVELS

Tocqueville Leaders (\$10,000 and above): Tocqueville donors receive special seating for every United Way event, participation in special opportunities for input that arise throughout the year, visits from the President, and recognition in the national registry and invitations to national events.



Tocqueville fast track program is a way to offer a step up to major giving with **Ambassador and Baron levels**. If a donor commits to increasing his/her gift to the \$10K level over a three to five year period, we will offer immediate recognition in the Tocqueville Society.

Investors (\$500-999): These leaders are Emerging Leaders invited to participate in peer groups that engage them in our work as they grow their support. **Young Leaders Circle** are under age 40 who join other next generation members in developing leadership connections through service. **Women United (\$500+)** unite for service and social events and is engaged in growing special initiatives of interest to them tied to our impact work.

KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

EVERYDAY HEROES

United Way is working to help Everyday Heroes like ALICE who work hard to make sure our community is great but are struggling to get by. Workplace Campaign pledges help us help ALICE.

Every donor has the opportunity to be an Everyday Hero for ALICE by pledging just \$1 /day (\$365/year). Most donors will not miss \$1/day from their paycheck, but the generous \$365 / year gift toward United Way initiatives that help ALICE get ahead will inspire change that makes our community better for all to live, work, learn and play.

Create an Everyday Heroes theme for your workplace campaign. What better way to inspire employees to become Everyday Heroes for ALICE?

EVERYDAY HEROES CAMPAIGN THEME IDEAS...

- **Host a lunch fit for Everyday Heroes** with Superman ice cream, Hero sandwiches, and Sidekick sides
- **Highlight a Company Hero of the Day** for outstanding work
- **Highlight an ALICE Hero of the Day** by sharing a United Way ALICE story about a person who works hard to serve our community but still needs help covering the high costs child care, transportation, housing, healthcare, emergencies.
- **Create incentive, raffle or auction packages based on Everyday Heroes theme:** Wonder Woman spa package, Batman man cave accessories, Aquaman beach basket, Action Hero movie package, etc.



Uniting to inspire change and build thriving communities. **GOAL: help 10,000 more working families meet their basic needs by 2025.**

KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

LABOR UNITED

United Way has a long and rich history of partnering with unionized labor to meet the needs of working families. West Michigan United Labor's mission is to increase the capacity of organized labor to impact the community through recruitment and training, deploying a prepared group of union volunteers where needed. The committee is a gatekeeper for union activists to assess and forecast community needs.

Union employees are generous campaign donors. Growing union support will grow your organization's campaign and community impact.

Local Union Leadership can help the United Way Campaign by:

- **Pledging a generous gift** as the leader of your local union organization.
- **Promoting the labor leads program** through Michigan Association of United Ways.
- Appointing a **union representative to the campaign team** at each site.
- Developing and promote a **New Hires Program**.
- **Encouraging members** to attend and participate in your local United Way campaign meetings.
- Actively **endorsing the United Way concept** of community giving.



Uniting to inspire change and build thriving communities. GOAL: help 10,000 more working families meet their basic needs by 2025.

KEYS TO A SUCCESSFUL WORKPLACE CAMPAIGN

THINGS TO KEEP IN MIND WHEN MANAGING A CAMPAIGN

Not all campaigns look the same.

Some organizations do everything right – they bring employees together, bring United Way in to tell the community's story, offer and award incentives for gifts, set solid reachable goals and then celebrate success.

Other organizations do campaigns their way and it works for them.

We encourage companies to run Best Practice Campaigns through increased leadership investments, more everyday heroes, and increased participation. We do this by explaining the benefits of campaign growth to their organization.

We cannot change the internal culture of a company.

We cannot go inside a company and tell them how to run a campaign.

It is with our guidance and leadership that we show them how to be successful.

With patience, a company will come to see that a Best Practice Campaign is better for them in the long run.

Organization campaigns are managed with a strong professional guidance and the Division Chair's ability to communicate to the CEO will be most helpful as we increase community investments in campaign.

The future of United Way will depend on solid relationships that endure outside campaign time.

Encourage company leaders to participate with their time, to participate in Day of Caring, and to participate with the Community Investment process.

The CEO is a "sales call" and your product is an improved community for all.

It's hard to sell something you can't hold in your hand, so learn how United Way works. If you understand the point of United Way, you can "sell" impact to community leaders.

Be committed to learn and understand.



Uniting to inspire change and build thriving communities. GOAL: help 10,000 more working families meet their basic needs by 2025.

GLOSSARY OF TERMS

Campaign Division: The segmentation of work place campaigns, such as manufacturing, education, retail, etc. Each division requires a chairperson and volunteers to develop, implement, and evaluate a division plan for action, education, and involvement of current and prospective business.

Community Partner: Those non-profit organizations dedicated to providing a necessary service in one or more of the United Way impact areas.

Designation/Designated Gift: A financial gift that is assigned or directed to a specific agency (must be a non-profit organization by IRS code) or another county's United Way campaign.

Everyday Hero: Individuals who annually invest in the community through a dollar a day pledge (\$365).

Leadership Circle: Individuals who annually invest in the community through pledges of \$500 or more.

Major Gifts: Gifts of \$10,000 or more are considered major gifts; these donors may become members of the Alexis de Tocqueville Society.

Young Leaders Circle: Young Leaders Circle connects a diverse group of individuals in their 20's, 30's and 40's to make an impact in the community.

Tocqueville Society: A national giving society designed to help United Ways involve and deepen the understanding, commitment and support of high net worth individuals in their communities. \$10,000 or more annual gift.

Pacesetter Company/Pacesetter Campaign: A business that has shown continued campaign improvement and commitment to Best Practices. These recognized leading businesses agree to run Pacesetter campaigns in mid-August to provide United Way with strong results, to set the pace for others at the beginning of campaign.

Planned Giving: This technique is a way for donors to give from their assets or wealth and is a long-term resource development and growth strategy for the United Way organization.

Pledges: The various types of financial contributions:

- **Corporate Gift** – A gift made directly from the company as a part of the business's commitment to United Way.
- **Corporate Match** – A financial match of the employee's gift, generally based on a dollar amount raised, percentage of participation, or other internal goals.
- **Employee Gift** – Financial gifts made by the individuals who work within a business.
- **Individual Gift** – Financial gifts made by individuals independent of his/her business.
- **Payroll Deduction** – An opportunity for employees to spread their gift over a specified period of time, with a small portion of the total gift withheld from their paycheck each pay period.
- **Special Event/Special Gift** – Money raised from activities such as a car wash, bake sales or jeans day. These dollars generally do not receive a Corporate Match.



JOB DESCRIPTIONS

DIVISION CHAIR

The Division Chair is responsible for managing the volunteers and businesses within his/her assigned segmentation of workplace campaigns.

The primary responsibilities include:

- Determine a division goal with assigned United Way staff person.
- Develop a division plan with his/her assigned United Way staff person.
- Identify and secure two Pacesetter accounts within his/her division.
- Recruit an appropriate number of volunteers to develop growth through new or underperforming businesses.
- Leadership recruitment and solicitation within assigned division.
- Establish successful communication between division volunteers and United Way staff to ensure objectives are reached within campaign timetable.
- Participate in meetings and events sponsored by the campaign chairperson.
- Recommend names for future division chairs or volunteers.
- **Have FUN!**

LOANED EXECUTIVE

The Loaned Executive is an individual from a local business organization or government agency who is assigned by his/her employer to work on the United Way campaign. They provide leadership, fund raising, and teamwork skills to assist local employers plan, implement and run successful United Way campaigns. They serve as a United Way spokesperson to the companies, conveying the needs of the community, specifically in the area of health and human services.

The primary responsibilities include:

- Build relationship with company coordinators.
- Analyze past giving history; develop goals and strategies for each account with company coordinator.
- Conduct presentations.
- Ask for contributions.
- Confirm amount and type of corporate gift by working with company coordinator.
- Thank everyone (especially company coordinator).
- Evaluate each workplace campaign and make recommendations for next year.
- Complete an account log.
- **Have FUN!**



JOB DESCRIPTIONS

ACCOUNT VOLUNTEER

The Division Volunteer is focused on running workplace campaigns within new businesses or smaller businesses not running active workplace campaigns.

The primary responsibilities include:

- Attend volunteer training.
- Select 6 – 8 businesses for personal solicitation.
- Visit with the company leadership of selective accounts and secure individual, company gift, or workplace campaign.
- Deliver company campaign materials or contact United Way for a workplace campaign.
- Participate in an evaluation of assigned businesses with division chair and United Way staff person.
- Celebrate our success!
- **Have FUN!**

EMPLOYEE CAMPAIGN COORDINATOR

The Employee Campaign Coordinator is an individual from a local business or government agency who is assigned by his/her employer to coordinate that company's United Way campaign. They demonstrate project management, leadership and organization skills to company leaders; strengthen working partnerships and provide an opportunity to forge new partnerships within the organization and with decision makers outside the company; and learn about community needs and the value of United Way.

The primary responsibilities include:

- Develop a campaign strategy.
- Recruit/train in-house campaign team, where appropriate, to coordinate departmental activities.
- Order and prepare supplies for distribution.
- Schedule campaign presentations.
- Arrange for internal publicity.
- Prepare campaign reports, and follow up on lapsed donors.
- Ensure proper recognition for volunteers and donors.
- Coordinate with organized labor (as appropriate).
- Complete report envelope with all pledge forms.
- **Have FUN!**



