United Way of Central Texas

ONE ORGANIZATION

LOOKING AT THE BIG PICTURE

2016-17 Coordinator Guide

In 2015, YOU raised $1,702,667! Thank YOU!!

One Team Can Ignite Hope!

Donors

2015 Community Impact Awards

Atmos Energy
Spirit of Giving and Largest Giving Increase with Under 50 Employees

Baylor Scott & White Health
Highest Percentage of Leadership Givers

Baylor Scott & White Health West Campus
Most Creative Campaign

Beltec Industries
Best New Campaign

Belton Independent School District
Spirit of Giving

Wilsonart International Inc.
Largest Overall Campaign, Most Leadership Givers, and Largest Giving Increase with Over 50 Employees

THE ALEXIS DE TOCQUEVILLE SOCIETY

The Tocqueville Society recognizes local philanthropic leaders and volunteer champions in the United States, France, and Romania who have devoted time, talent, and funds to create long-lasting changes by tackling our communities' most serious issues.

Alexis de Tocqueville Society members contribute $10,000 or more annually to United Way of Central Texas.

2015 Members

William D. DiGaetano
Jo Ann and Phil Leibowitz , Jr.
David and Janet Leigh
Elizabeth and Drayton McLane Jr.
Dr. Robert Probe and Dr. Barbara Weiss

"My husband and I give to United Way because we have seen first hand the work the United Way partner agencies do. The agencies' staff and volunteers work so hard to fill desperate needs around our community and it would be difficult for them to accomplish their goals without United Way support. We want to see them continue reaching people with the help they need."

- Janet Leigh

Top Campaigns

$200,000 and Above

Baylor Scott & White Health
CFC Temple
Wilsonart International, Inc.

$100,000 - $200,000

H-E-B

$25,000 - $49,000

Extraco Banks
Johnson Brother`s Ford
McLane Company
McLane Group
State Employee Campaign
Wilsonart Retirees

$10,000 - $24,000

Atmos Energy
Belton ISD
Central National Bank
City of Temple
First State Bank
Joe & Louise Cook Foundation
Materials Transportation Company
McLane Southwest
State Farm Insurance
Temple Daily Telegram
Temple ISD
UPS
University of Mary Hardin-Baylor

$5,000 - $9,999

BBVA Compass
Belco Manufacturing
Bell County
Belltec Industries, Inc.
BISD Kids Campaign
Brockway, Gersbach, Franklin & Niemeier, PC
Central Texas Housing Consortium
Don Ringler Chevrolet
Enterprise
Temple College
TISD Kids Campaign
United Way of Central Texas
Walmart Distribution Center

$1,000 - $4,999

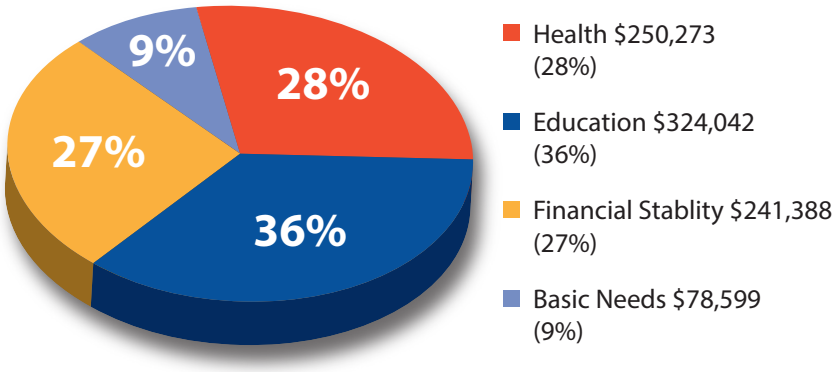
Applied Materials
AT&T
Boeing Company
BNSF Foundation
Caterpillar
Central Texas 4-C
Central Texas Council of Governments
Central Texas Youth Services
Cigna Health Insurance
City of Belton
Communities In Schools
Costco Warehouse Club
Custom Printing
The David Nix Agency-Nationwide Insurance
Dillards
Federal Express
Hilton Garden Inn
IBM Corporation
iZone
JC Penney
J.P. Morgan Chase Bank
Macy's
Mobil Foundation
Oncor Electric Delivery Co. LLC
Panel Specialists, Inc.
Perry Office Plus
Professional Data Solutions, Inc.
Ralph Wilson Youth Club
Target
Temple Machine Shop, Inc.
Valero
Vender Blender
Walmart of Temple
Wright Builders
Zachry Group

Up to $999.00

360 Tents, LLC
Acadian Ambulance Service
Acer America
American Printing
Bank of America Southwest Temple
Beall Research, Inc.
Bell County Expo, Inc.
Bryan Properties
Central Texas Children`s Center
CFC National Capital Area
Childrens Advocacy Center
Christian Farms/Treehouse
Cuba & Cuba, P.L.C.
Emballages Roda Packaging Inc.
Families In Crisis
General Electric
Health Care Service Corporation
Hershey's
Jeld-Wen
Johnnie's Cleaners & Tailors Inc.
Kasberg, Patrick & Associates, LP
Liberty Mutual Group, Inc.
Lone Star Legal Aid
Lott, Vernon & Company P.C.
O'Reilly Auto Parts
Sam's Club
Sprint/Nextel
Tarver & Blythe
Temple Chamber of Commerce
Manpower
Trinity Lutheran Church
Union State Bank
United Health Group
V-Quest Office Machine & Supplies
Variety's Peaceable Kingdom
Walmart of Belton
Wells Fargo Bank

...that is impacting the lives of your neighbors through these programs:

2015 - 2016 Investment



EDUCATION

- Belton Christian Youth Center
- Boy Scouts of America
- Central Texas 4-C Inc.
- Central Texas Children's Center
- Communities in Schools of Greater Central Texas
- Girl Scouts of Central Texas
- Peaceable Kingdom Retreat for Children
- Ralph Wilson Youth Club

FINANCIAL STABILITY

- Bell County Community Coalition
- Central Texas Youth Services
- Community Loan Center
- Family Promise of East Bell County
- Families in Crisis
- Helping Hands Ministry of Belton
- Temple ISD

HEALTH

- Body of Christ Clinic
- BridgeS to Wellness and Health
- Cenikor Foundation
- Children's Advocacy Center
- Our Lady of the Angels Shelter
- Temple Community Clinic

BASIC NEEDS

- American Red Cross
- CASA of Bell & Coryell Counties
- Community Needs Assessment
- Hill Country Community Action Association
- Lone Star Legal Aid
- St. Vincent de Paul

Key Initiatives

Volunteer Income Tax Assistance (VITA)

IRS certified VITA volunteers offer free tax help to people who make $50,000 or less, persons with disabilities, the elderly, and limited English speaking tax payers who need assistance in preparing their tax returns.

In 2016, VITA volunteers helped prepare over 800 tax returns. Over $1 million in refunds and over $409,000 in Earned Income Tax Credits (EITCs) were returned to people living in our community.

BridgeS to Wellness and Health

BridgeS to Wellness and Health, a collaborative strategy, provides temporary assistance to underinsured and uninsured clients who are unable to afford the necessary prescriptions, equipment, supplies, and transportation to maintain or improve their health status.

Estimated BridgeS to Wellness and Health prescription cost savings for Central Texans in 2015 is over $150,000.

Health Insurance Education and Enrollment

UWCT employs state and federally certified Health Insurance Marketplace Navigators. Navigators are local resources for enrollment into qualified health plans in the Marketplace and public programs including Medicaid and CHIP.

UWCT Navigators met with approximately 2,100 different family members in 2015, and enrolled over 180 families into Qualified Health Plans.

SOAR (Savings, Opportunities, Assets, Results)

The SOAR collaborative promotes self-sufficiency among low-to-moderate income populations in Central Texas. SOAR facilitates a financial literacy program and matched savings from earned income that can be used for attending post-secondary education or first time homeownership.

For each dollar a participant saves, they receive a match of 8 dollars, up to a $2,000 savings goal over 24 months.

2-1-1 United Way HELPLINE

2-1-1 connects Central Texans to help from a variety of state agencies and community groups with a single phone call. 2-1-1 is the number to call when you don't know who to call, whether you need help finding child care, food stamps, care for an aging parent, or a haven from domestic violence.

2-1-1 services in Central Texas answer more than 50,000 calls every year. In 2015, Central Texas 2-1-1 received nearly 3,000 military member phone calls connecting Veterans and their family members to local resources.

United Way of Central Texas

Let's do it again!

Why United Way?

OUR STRATEGIC VISION

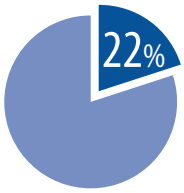
HEALTH
Working to promote a healthier community

FINANCIAL STABILITY
Financial Stability is the key to improving quality of life

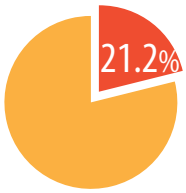
EDUCATION
We help children achieve their full potential through education programs

BASIC NEEDS
We are committed to ensuring that families are stable and in a safe environment

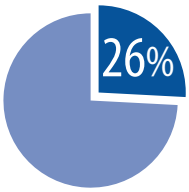
SOME OF OUR COMMUNITY NEEDS



22% of Central Texas
children live below the poverty line



21.2% of Central Texans
are uninsured. The national average is 13.4%



26% of Central Texas
children are food insecure

1 in 3 Texas households
don't make enough money each month to pay for rent, food, transportation, utilities, and medications

$3,000
The average cost to repay a $500 payday loan in Temple, Texas

Top 5 calls to our 2-1-1 Helpline
utilities - rent - food
childcare - affordable housing

HOW DO WE TACKLE THESE ISSUES?

Volunteers evaluate and make investment decisions for every service, making sure we are achieving measurable outcomes through the COMMUNITY INVESTMENT PROCESS

Volunteers lift up our neighbors and the community through ongoing VOLUNTEER PROJECTS creating impact

United Way creates and leads SPECIAL INITIATIVES generating long-lasting systemic change in key areas

ANNUAL CAMPAIGN fuels our work. In 2015-16, contributions topped $1.7 million into programs and initiatives advancing the common good

Welcome to the Team!

United Way Campaign Coordinators are ambassadors, organizers, motivators, and storytellers. As your organization's campaign leader, you will educate and inspire others about the work of United Way and help them understand how their contributions help United Way improve lives and our community. You enable your co-workers to invest in what matters by planning, organizing, and coordinating a successful United Way campaign within your company.

Letter from the Campaign Chair

I am honored and humbled to represent as the 2016 Campaign Chair and would like to thank the many individuals who have provided leadership, numerous volunteer hours, as well as steadfast financial investment to allow the United Way of Central Texas to "change the story" for so many in our community. Your efforts and the continued funding of over 30 existing and meaningful community programs operated by our United Way partner agencies is helping these agencies change lives here in Central Texas. I am especially excited about our Community Impact Model and how the United Way of Central Texas leadership is collaborating with other community leaders to implement many new and innovative programs which you will surely hear about in the weeks and months ahead. You can be confident that your efforts and financial investments are creating significant and positive outcomes. We are just beginning the journey however. I would like to personally request your continued leadership and volunteerism, as well as, if possible, financial investment this year. Your support is critical and truly appreciated. This is our campaign. Thank you for partnering with me to ensure a success this year.

Eyal Kaczur
Director of Provider and Community Engagement
Baylor Scott & White Health

SAY THIS, NOT THAT:

Tips for talking about United Way of Central Texas

United Way of Central Texas

Many people are familiar with United Way as an organization, but most don't know what we do or how we do it. Some know that United Way is a charity that used to have a thermometer to measure a campaign goal; others are familiar with LIVE UNITED banners at an NFL game. Even more people think we are an airline, an insurance agency or simply have never heard and don't think about us at all.

You can help erase confusion and generate enthusiasm by using these tips when talking about United Way. These tips are intended to help you have productive, meaningful conversations about the impact of United Way.

SAY THIS:	NOT THIS:
We fundraise for impact and long-term community change.	We fundraise to reach our campaign goal.

Shifting our emphasis from increasing dollars to impacting people helps our community focus on what really matters; strengthening our community and improving lives.

The more we raise, the more money we have to invest in the people and communities in our area.	The more we raise, the more money we can give away to agencies.

We invest in common sense solutions facing our growing communities. In order to face those issues head on and generate tangible results, we want to invest in the programs, initiatives, products and agencies that will generate the greatest return. Our work has expanded beyond providing funding for other nonprofits.

We advocate for the health, education, and financial stability of every person in every community.	We are a charity that helps the poor/needy/children/old people.

We advocate for positive community outcomes within the core building blocks for a good quality of life - education, financial stability, health and basic needs. We can't do it alone. We need the help of others - donors, partners and volunteers to strengthen our community and improve lives.

We work towards common-sense solutions to challenges facing our community.	We fund programs that help people in crisis.

We thoughtfully and strategically invest in solutions to challenges facing our growing community. Our investment strategies consider long-term impact on individuals and families, increasing access to services in areas where resources are scarce, and quality programs that provide measurable results.

5 STEPS

TO RUNNING A SUCCESSFUL CAMPAIGN

1: PREPARE

Recruit a strong team to lead your
United Way campaign.

2: INSPIRE

Share the United Way story with
all employees.

3: ENGAGE

Connect employees to our work and show them
how they can do something about it.

4: ASK

Ask everyone to give.

5: THANK

Thank everyone for giving.

1: PREPARE

Develop your plaan!

Learning about the work of United Way

Recruiting a team for your company's campaign

Setting your strategy and goals

CAMPAIGN IDEAS

Best Dressed

iZone Imaging hosted a Halloween costume contest between departments. Employees made a donation to UWCT, placing vote on their favorite costume.

Build a team of enthusiastic volunteers

Involve them in planning a strategy and setting a goal that fits your company's size and culture.

• Establish Support from the Top — Get your CEO actively involved in all aspects of your campaign through events and communications.

• Recruit a Campaign chair — Who will lead and support your activities.

• Enlist a Leadership Giving Chair — Leadership giving is the foundation of every successful campaign.

Identify employees who are energetic and have a variety of skills to serve on the campaign steering committee

Recruit campaigners to connect one-on-one with employees. The ideal ratio is one campaigner for every 10 employees.

Develop a campaign strategy that fits your company's size and culture, engaging everyone at all levels.

Set a campaign goal:

• Consider prior year results, number of employees, and current business climate.

• Visibly track results throughout the campaign.

Consider these objectives that will boost overall results:

• Increasing employee participation

• Increasing donations through payroll deduction

• Asking employees to increase their gifts from last year

• Increasing leadership giving

2: INSPIRE

Inspire employees to get involved with United Way's work to improve individual lives and our community.

Help them see the impact they make through United Way.

CAMPAIGN IDEAS

Ham & Beans

City of Temple Fire Department hosted a Ham & Bean Bake to benefit UWCT. Fire fighters prepared the meal and invited community guests to attend.

Share the United Way story

• Share videos and stories featuring those impacted by United Way. You can download both from UWCT's online Campaign Toolbox.

• Make plans to send a series of emails to employees to keep everyone informed of the good work that United Way does in the community as well as your campaign progress.

• Include information about UWCT in your company newsletter, intranet, or other internal communication channels.

• Place UWCT posters meeting areas and break rooms.

Harness the power of personal testimonies

• Ask a colleague who has benefited from United Way to share their experience.

• Show the United Way video that demonstrates how United Way changes lives.

Invite employees to see United Way's work in action

• Set up community impact tours for employees to see firsthand their dollars at work.

• Tour 2-1-1 Texas/United Way HELPLINE and listen in on calls to hear more about the needs in our community and how United Way works to meet them.

3: ENGAGE

Connect employees to the work of United Way and how they can do something about it.

CAMPAIGN IDEAS

Get Your Hands Dirty

City of Belton invites employees to participate in UWCT Day of Caring, helping employees build a personal connection with United Way's work.

Get employees involved

• Attend and invite your colleagues to attend the United Way Campaign Kick-off.

• Schedule a United Way community bus tour or tour of the 2-1-1 Texas/United Way HELPLINE call center.

• Form a volunteer group and fill out our online volunteer form for ways to give back to the community in a meaningful experience.

• Hold a company-wide kick-off at the beginning of your campaign.

• Use special events and fun activities to add an additional spark to your campaign.

• Find ways to incorporate United Way into already planned meetings and events.

• Encourage those under 30 to help our community socialize through various social media outlets (feel free to tag us!)

Give employees an opportunity to do more

• Share the impact and benefits of leadership giving at management and employee meetings.

• Share the impact that volunteering can give to not only the community, but your employees as well

Day of Caring

Each year, hundreds of volunteers come together to make a lasting difference in our community through Day of Caring projects. Day of Caring volunteers enjoy a meaningful volunteer experience and firsthand look at the good United Way is making possible in Central Texas. Get your team personally involved in United Way's work by scheduling a Day of Caring project.

4: ASK

A great way to communicate the needs in our community and make "the ask" is by inviting a United Way representative to speak with your ejmployees during a meeting or event.

The number one reason people do not give is because they are not asked.

Make it a priority to educate and provide the opportunity for every employee to give. And remember, United Way believes that giving is a personal decision.

CAMPAIGN IDEAS

Kiss The Pig

Baylor Scott & White Healthcare hosted a Kiss the Pig Contest. Employees casted their vote by making a donation to UWCT. First, second, and third place faculty members had to pucker up kiss a pig!

How to ask

• Ask people one-on-one to support United Way through your company campaign.

• Use campaign events and staff meetings to educate employees about United Way's work and ask them to help make that work possible.

• Ask your company leadership to attend meetings or events, publicly endorse the campaign, and encourage employees to do so as well.

• One great way to communicate the needs in our community and make "the ask" is by inviting a United Way representative to speak with your employees during a meeting or event.

How to give

• Payroll deduction (the easiest way to give)

• Cash/check

• Credit cards

• Direct billing

5: THANK

A little thanks goes a long way.

THANK YOU IDEAS

Pizza or cupcake party

Casual or jeans day

Appreciationgrams - notes of thanks you can leave on desks or in mailboxes.

Spring Carnival

TISD hosts an Annual Old Time Carnival in the Spring to benefit UWCT. All TISD families are invited to attend. Activities include games, face painting, petting zoo, jump house, cake walk, and many more.

Say it

Through their generous gifts to United Way, your campaign team, and colleagues have helped make a better future possible for our neighbors. Make sure all donors hear a great BIG thanks!

Consider hosting a thank you event for employees, announce results via internal communications, and send a thank you letter or email to all donors.

Submit it

Work with your United Way representative to close out your campaign. Submit an electronic summary of donor results and information. This report will contain pledge card data, payroll summary data, and corporative pledge data. A hard copy of this information should be turned in with your campaign report envelope.

Send it

Help ensure United Way is able to thank your company's donors. Work with United Way to compile a complete and accurate list of leadership donors.

Provide donor contact and gift information so we can properly express our thanks.

United Way says and shows thanks by hosting special events and publishing materials that recognize donors.

MAXIMIZE YOUR IMPACT WITH LEADERSHIP GIVING

Why Leadership Giving?

Leadership giving is the best strategy to grow your campaign and strengthen your community impact. United Way leadership donors get unique opportunities to learn about community issues and are invited to participate in a variety of social, networking, and recognitiion activities, which build loyalty and can increase giving in future company campaigns.

1: Appoint a Leadership Giving Chair

This role is best played by a leadership donor who is a senior officer in your organization. As a role model, they are passionate about United Way and willing to invest time in this effort.

2: Recruit a team of leadership donors to support your efforts

Peer-to-peer contacts are the best way to recruit leadership donors. Volunteers should be able to answer questions about United Way, personally share why they give, and ask others to join them.

3: Analyze your current campaign

Work with your United Way representative to review past leadership giving information.

Questions to consider:

- Does 50% of your employee giving come from leadership giving? If not, leadership giving is an area of opportunity.
- How does your company rank among peers in your industry?
- Are you making a special appeal to attract contributors at different levels and initiatives?
- Do you have strategies in place to retain current donors?

4: Develop an action plan

- Ask current leadership donors to consider increasing their gift
- Make special appeal to executives for Alexis de Tocqueville Society Membership

• If possible, ask HR to help identify prospective leadership donors:

— Employees currently giving $500 or more to United Way

— Retirees who were longtime United Way contributors

5: Recognize those who donate

Recognize your contributors with a personalized thank you letter from the CEO. Coordinating a thank you event or a salute in your organization's newsletter or on the company's intranet are other great ways to highlight leadership donors.

United Way recognizes your organization's leadership contributors by sending a personal thank you letter, publishing a roster of all leadership donors, hosting the Campaign Awards Bus, Volunteer Appreciation Picnic, educational and networking events, and sending special communications about the work of United Way.

McLane Group hosted a staff silent auction and dessert party to support UWCT.

University of Mary Hardin-Baylor staff and faculty create and donate goodie baskets. The items are sold at silent auction during a Crusader football game.

BISD Kids Campaign supports UWCT by selling "Spirit Links" throughout the district, creating friendly competetion between campuses.

RESOURCES
TO DO SOMETHING ABOUT IT

1: Your United Way Team
United Way of Central Texas staff is here to help you energize, engage, and inspire employees throughout your campaign. They are your greatest resource and are an important part of your TEAM. Contact us for help with your questions, scheduling speakers, developing customized volunteer experiences, and implementing new campaign strategies.

2: United Way Website
Visit UWCT.org to learn about our work and to download campaign materials, beneficiary stories, photos, and other campaign tools.

3: United Way Annual Report
Make sure everyone you are asking to support United Way receives this report. The United Way Annual Report provides an overview of our goals, statistics on community needs, descriptions of our services, and more.

4: Campaign Manual
To energize and educate your committee and campaign team, equip them with this useful guide.

5: Campaign Toolkit
Flyers, brochures, and logos are available for UWCT workplace campaign marketing at your office. Visit http://www.uwct.org/campaign-toolbox to download resources.

6: United Way Video
Share UWCT's video to help your colleagues understand the breadth and impact of United Way's work. The videos featuring the stories of individuals who have been helped by United Way are another great tool to educate and inspire.

CAMPAIGN CHECKLIST

BEFORE THE CAMPAIGN

- √ Meet with your United Way representative
- √ Attend the Campaign Coordinator Training
- √ Secure CEO/Senior Management Support
- √ Review Campaign history and set your goals
- √ Recruit a campaign committee to help with the campaign
- √ Determine your campaign plan, timeframe, and any incentives
- √ Gather your campaign communications and any campaign materials
- √ Schedule your kick-off, United Way speakers, and any special events
- √ Promote the campaign with an announcement

DURING THE CAMPAIGN

- √ Distribute pledge forms and campaign materials to every employee
- √ Set goal of 100% ask rate
- √ Promote the campaign, kick-off, and special events through numerous channels
- √ Hold a mid-campaign committee meeting to review the progress towards the goal
- √ Send regular progress reports to employees
- √ Follow-up with individuals who have yet to turn in their pledge form
- √ Send reminders about campaign events, incentives, and deadlines
- √ Avoid leaving pledge cards in mailbox or on a desk without making an individualized ask

AFTER THE CAMPAIGN

- √ Collect all pledge forms and campaign material
- √ Schedule a time with your United Way representative to complete the paperwork
- √ Take care of any corporate contributions or matches on employee giving
- √ Send a thank you letter to everyone including the campaign committee and the CEO
- √ Publish a short story, photo, and the results of your campaign in the company newsletter
- √ Hold a post campaign committee meeting to evaluate the challenges and successes of the campaign. (Keep the notes handy for next year!)
- √ Talk to your United Way representative so that we can continue to improve our service

YEAR ROUND

- √ Keep employees updated on activities of United Way
- √ Promote volunteer opportunities to employees

United Way of Central Texas

www.UWCT.org

Contact Your United Way Team!

Call us any time! (254) 778-8616

Speaking Requests / Corporate Engagements

Stephanie O'Banion stephanie.obanion@uwct.org

Marketing Materials

Sadie Meador sadie.meador@uwct.org

Volunteer Engagement

Mary Beth Kauk marybeth.kauk@uwct.org

Financial Questions / Campaign Envelopes

Roy Salazar roy.salazar@uwct.org