

ABOUT OUR UNITED WAY



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President and CEO

United Way of the Mid-South

OUR FOCUS ON THE MID-SOUTH'S GREATEST CHALLENGE: POVERTY.

United Way of the Mid-South is in its fourth year with laser focus on our region's single largest issue: poverty. The impact we make in local economic and social mobility are all helping more people escape poverty and enjoy lives of stronger financial stability.

DRIVING THE DREAM

United Way has focused attention on poverty reduction that will lead to economic prosperity for individuals, families and the Mid-South. *Driving The Dream* is the transformative human services system of care designed to move people from where they are to where they dream to be. The goal is a Mid-South in which all people have equitable access to resources and supports needed to achieve their hopes and dreams by fostering a community where the people we serve are hopeful, resilient and self-sufficient. We know that families come in all different shapes and sizes and that challenges facing one family member have a direct impact on the experiences and outcomes of other family members, so we have adopted a two-generational, whole family service delivery model. As part of this effort, we are promoting best practice models proven to move the needle on root cause issues that perpetuate poverty. We are equipping our partners with the tools and resources they need to change both culture and practice for the better.

WHAT HAPPENS WHEN I MAKE A DONATION TO UNITED WAY?

United Way of the Mid-South knows there are many organizations you can support, and we appreciate your trust. We're proud that Forbes magazine ranks United Way Worldwide as the nation's top local resource development charity and reports on our firm commitment to transparency and high standards of ethical practice.

Your gift to United Way is paired with the contributions of your coworkers, neighbors, friends and family members to create a tremendous force for our common good. Scores of local volunteers - people like you - are trained to evaluate and make recommendations on funding decisions through our United Way allocations process.

These volunteers learn about the needs of our community, examine the operations and budgets of local nonprofit agencies and programs, and make the tough decisions of how much should be invested in which programs for the most significant impact moving individuals and families from where they are to where they dream to be, while positively impacting the issue of poverty.

Our United Way Board of Directors (also made up of local, unpaid volunteers) review the allocations funding decisions as yet another level of safeguarding your donation. At United Way, we are committed to multiple levels of oversight to ensure your gift is used wisely, effectively, and in ways that have the most significant impact on life in the Mid-South area.

YOUR ROLE AS A

CAMPAIGN REPRESENTATIVE

WHAT IS A CAMPAIGN REPRESENTATIVE?

A Campaign Representative (CR) is a person who helps United Way of the Mid-South by leading parts of the resource development drives at organizations across our area. Working alongside and reporting to United Way staff members, they are instrumental in helping secure important resources for United Way's fight against poverty.

WHAT DOES A CAMPAIGN REPRESENTATIVE DO?

Campaign Representatives provide leadership, fund-raising and teamwork skills to assist Employee Engagement Champions (EECs) and United Way Resource Development Managers in leading successful United Way campaigns within their companies or organizations.

RESPONSIBILITIES:

- Attend Campaign Representative orientation and training at United Way.
- Analyze giving history for each account assigned to them and work with United Way staff to establish and record current campaign status.
- Work closely with your employee campaign coordinators to develop effective campaign plans.
- Assist EECs with presentations at campaign meetings and events and ask for contributions.
- Manage the distribution and collection of campaign materials.
- Assist EECs in planning and implementing their campaign kickoff and recognition events.
- Encourage leadership giving in every company campaign.
- Attend United Way kickoffs, reporting meetings and CR meetings as needed.
- Consider making a gift yourself.
- Recruit new corporate and employee accounts.
- Complete and maintain accurate, comprehensive account files.
- Pick up company reports from your EECs and submit all final reports with pledge forms to United Way in a timely manner.
- Thank your EECs for leading successful campaigns.
- Evaluate and make recommendations for next year.

CAMPAIGN GLOSSARY:

YOUR TEAM AT WORK

- Campaign Committee: a group of people in a workplace who educate their colleagues about United Way and build support and excitement around the campaign.
- Leadership Chair: a leadership giver (someone who contributes \$500 or more), at a company who encourages new and existing leadership givers during the campaign through special presentations, discussions and meetings.

YOUR TEAM AT UNITED WAY

- Resource Development staff:
 United Way employees who assist you with campaign efforts, including year-round activities.
- Employee Engagement
 Champion (EEC): a person at
 one of our corporate partner
 companies who helps his/her
 organization work with United
 Way of the Mid-South and leads
 their organization's United Way
 campaign through planning,
 implementation and evaluation.
- Director, Major Gifts: a United Way staff member who helps plan leadership giving strategies, events, etc. to recruit and recognize individual givers who are members of Leaders United (contribute \$500-\$9,999) and the Tocqueville Society (contribute \$10,000 or more).



For over

150,000 strates

living in poverty in Memphis, it isn't a lack of effort that keeps them from achieving their goals, but rather a lack of access to resources and services.

YOU ARE MAKING AN IMPACT IN OUR COMMUNITY

The United Way's annual campaign is about bringing people together to address our community's most important issue - poverty. As a United Way Campaign Representative of the resource development campaign, you stand with thousands of other local volunteers who are making a measurable impact in the lives of the people in our area.

Due to the success of the workplace representative, the generosity of our donors and the dedication of our volunteers, United Way of the Mid-South is able to support a network of nonprofit organizations and hundreds of programs that are hard at work every day, improving economic and social mobility to reduce poverty right here in the Mid-South.

This handbook is designed to lead you step-by-step through a United Way campaign offering tools, tips and best practices to ensure your success. While this handbook offers a good overview of a United Way representative, it does not answer every question. More resources are available by contacting your United Way staff representative or by visiting our website at **www.uwmidsouth.org**.

Thank you for volunteering to be a part of our United Way resource development drive. By giving your time, talent, and treasure - and spreading the word - you're helping advance the common good. Together, we can inspire hope, create opportunities and help reduce poverty across our area.

Together, we can do more good than any one of us can do alone.

TALKING ABOUT

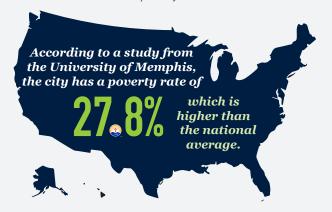


DRIVING THE DREAM AGAINST POVERTY

At United Way of the Mid-South, we're assembling partners to address our community's single biggest challenge: poverty. We want more people to escape poverty and live the life of their dreams. We call this initiative "DRIVING THE DREAM."

POVERTY IS OUR AREA'S BIGGEST PROBLEM

 Memphis is at or near the top of national listings of large metro areas for overall poverty.



- Over 150,000 people live in poverty in Memphis.
- Even more alarming, **44.9% of the city's children** live in poverty the nation's second highest child poverty rate.
- Memphis is the second most impoverished MSA with a population over 1M people.
- No single organization or individual can solve the problem alone

A SHIFT FROM REACTIVE TO COOPERATIVE

Memphis has a long history of fighting poverty, most often reacting to the impact it has on our residents and community. These efforts are significant, and *Driving The Dream* is bringing groups with a long history of poverty work together to strengthen our cooperative efforts. We're creating a network of care that uses shared strategy, data and teamwork across multiple organizations to help more people gain greater financial security.

BENEFITS TO INDIVIDUALS AND THE LOCAL ECONOMY

A more aggressive approach to poverty reduction will transform the lives of individuals and families, moving them from a state of economic crisis to greater self-sufficiency. Lowering our high poverty rates will also strengthen our local economy. More people escaping poverty results in greater efficiencies in services and increases the amount of spendable cash in the area, which is a benefit for businesses' selling goods and services.

PARTNERS UNITED IN A TEAM EFFORT

Moving the needle on poverty requires a team effort - a partnership of people from nonprofits, services and organizations working with individuals and families who strive to advance them from poverty to prosperity. Together, we can help people in poverty discover their dreams, follow a plan to escape poverty and see those dreams come true. It takes people and professionals who are driven to see changed lives and a stronger community.

PARTNERS USING THE SAME TOOLS AND MEASUREMENTS

Driving The Dream organizations are trained to use three vital strategic tools so we can be sure we're all speaking the same language and focused on the same outcomes:

- Consistent operating Best Practices and training for agency care providers to help clients develop their own "Map of My Dreams" and co-create a path from where they are to the life of their dreams.
- A shared technology platform to make/receive referrals in a centralized database to track individual, program and community-level progress and gaps.
- A standardized assessment tool to identify a client's needs in areas such as housing, education, employment and life skills.

A BATTLE WE MUST WIN

Our battle against poverty is a fight we must win for the sake of everyone living in the Mid-South. Our *Driving The Dream* initiative has some significant advantages:

- We have a great team of experts with skill, heart, courage, and drive, working together.
- We serve a community that understands the challenge and supports *Driving The Dream*.
- Driving The Dream clients are invested in their plan to advance out of poverty to live the life of their dreams.

You can help us make a difference!

TALKING ABOUT UNITED WAY: MAJOR POINTS

Many people have heard of United Way, but few understand the breadth and scope of our work. These major talking points will help you speak about United Way, helping people see and understand the "big picture," leading to greater understanding and stronger involvement.

BRINGING PEOPLE TOGETHER TO ADDRESS THE MID-SOUTH'S BIGGEST CHALLENGE: POVERTY.

United Way of the Mid-South is the leading catalyst in stimulating support and services for individuals and families as they progress from poverty to prosperity.

- United Way is where people, organizations and sectors across the region pool talents, time, resources and influence to help people in need and create greater opportunities for everyone.
- Our top priority is to help people advance out of poverty and improve the quality of life for all Mid-Southerners.

THE COMMUNITY IMPACT FUND: GIVING HELP WHERE IT IS NEEDED MOST

We can do more good together than any one of us can do alone.

- Making an undesignated investment in United Way, and its Community Impact Fund strengthens the impact of your donation and those of your colleagues, neighbors, friends and family members.
- Together, these gifts to United Way's Community Impact Fund create a significant force for good.

LOCAL VOLUNTEERS – LIKE YOU – ANALYZE OUR AREA'S CRITICAL NEEDS AND HOW NONPROFITS WITH A PROVEN TRACK RECORD CREATE A DIFFERENCE.

United Way serves as a capacity builder for the nonprofit sector by stewarding donor dollars.

 Volunteers make the tough decisions of where and how to distribute your gift so it does the most good for the most people, impacting thousands of lives in our area every day, in a way no single-cause organization can accomplish.

DRIVING THE DREAM: PEOPLE ADVANCING OUT OF POVERTY TO LIVE THE LIFE OF THEIR DREAMS

United Way provides focused attention to poverty reduction which leads to economic prosperity for individuals, families and the Mid-South.

- United Way's *Driving The Dream* initiative brings nonprofit and human service professionals together to create a new system of care.
- This system helps people identify their dreams and create a step-by-step plan to advance out of poverty and live out those dreams.
- The key to the Mid-South's economic prosperity IS poverty reduction.
- Every time one person escapes poverty, we all benefit.

UNITED WAY: ITS UNIQUE POSITION TO HELP AND INFLUENCE.

United Way of the Mid-South is the largest, public, charitable foundation in the Mid-South.

 United Way is uniquely positioned at the intersection of nonprofits, health and human services agencies, businesses, community organizations, government, volunteers, faith-based groups, and private foundations

 all rallied around a shared vision for a better, stronger, more viable Mid-South.

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YOUR GIFTS CREATE AN IMPACT IN YOUR COUNTY.

The donations you make to United Way of the Mid-South stay in your community. United Way serves our eight-county area: Fayette, Lauderdale, Shelby and Tipton counties in Tennessee; Crittenden county in Arkansas; and DeSoto, Tunica and Tate counties in Mississippi.



UNITED WAY

PROGRAMS & INITIATIVES

UNITED WAY OF THE MID-SOUTH PROVIDES HELP IN WAYS YOU MAY NOT EXPECT.

In addition to funding local services, programs and agencies through direct cash grants, United Way provides important services to our local community such as:

DRIVING THE DREAM

United Way of the Mid-South has created *Driving The Dream*, a new, innovative system of care to address the effects of poverty and help people craft – and reach – the life of their dreams. A coalition of agencies who are all focused on investing in innovative poverty reduction solutions and economic growth strategies will create opportunities for us all. That means Mid-Southerners in poverty can receive support now, and be connected to resources and opportunities to free them from generational cycles of poverty.

FREE TAX PREP PROGRAM

Mid-Southerners living in poverty, living with low income, or who make \$55,000 or less in household income can receive FREE tax preparation and e-file through United Way's Free Tax Prep program. In the 2019 tax filing year, it brought the Mid-South economy over \$14 million in federal tax refunds to 10,980 filers including nearly \$4 million in federal credits. It is a massive part of our work to reduce Mid-South poverty, resulting in families getting a financial boost. It saves Mid-Southerners millions in fees and ensures they claim all the credits for which they are eligible. Refunds from this program often result in 20% or more of a household's annual income.

FAMILYWIZE DISCOUNT PRESCRIPTION CARDS

Medical expenses can force lower-income families to make difficult decisions between purchasing medicine, paying bills, or buying food. United Way's partnership with FamilyWize discount prescription cards helps people save costs related to many prescriptions. FamilyWize can help reduce costs for underinsured and uninsured. For more information, visit www.familywize.org.

2-1-1 HELP LINE

United Way's partnership with the Memphis Public Library system provides a vital call center to connect people in need with services. Trained 2-1-1 operators assess the person's situation to refer them to nonprofit, government and other services that fit their needs. 2-1-1 provides a streamlined approach for the caller to navigate them to the best program in an efficient manner. 2-1-1 receives more than 50,000 calls each year. For more information, visit the Memphis Library website.

YEAR ROUND ENGAGEMENT

FOR ENGAGEMENT AND VOLUNTEERISM



Increase the impact that organizations you visit have on our area with United Way of the Mid-South. We can work with companies to tailor their corporate philanthropic goals and build a strategy to engage employees. We offer a breadth of meaningful, visible group and/or individual volunteer experiences. In this menu, you'll find a range of rewarding, hands-on volunteer experiences that match both personal passions and corporate community visions.

EMPLOYEE GIVING CAMPAIGNS

A United Way of the Mid-South workplace campaign is an organized, company-sponsored fundraising drive where employees invest in United Way of the Mid-South to help address the area's biggest challenges. Locally, we have identified that challenge as **poverty**, which we fight to alleviate through our *Driving The Dream* initiative.

Our fundraising drive: ▶

 Educates employees about the most pressing issues in our community; the work of United Way of the Mid-South and your company's commitment to social responsibility.

- Offers a secure and easy system for employees to contribute their annual gifts and make the greatest impact for the Mid-South community.
- Provides a designated United Way of the Mid-South representative to advise on best practices for
 corporate supported activities that create awareness about United Way of the Mid-South and the workplace
 campaign (e.g., leadership engagement, kick-off event, volunteer opportunities, etc.).

EDUCATIONAL EVENTS

United Way of the Mid-South provides numerous ways to engage your employees through educational events that:

Our educational events:

- Positively impact the way your employees view the organization as a whole.
- Encourages professional and personal development and helps to foster an environment of philanthropy.
- Informs employees about the issues currently facing the greater Mid-South area and ways to get more involved.
- Provides opportunities that connect your employees with expert advice on trends in philanthropy and how to grow their impact through giving and volunteering.

◆ Tocqueville Society: a powerful group of local

and making a difference - personally and

business and civic leaders who individually, or as

a couple, contribute \$10,000 or more and share

a similar passion for investing in the community

- Lunch and Learn: In just one hour, United Way can provide your employees
 with more information on specific issues affecting our community such as
 education, financial stability, health, and poverty.
- Community Conversations: United Way wants to hear from you and your employees. In just 90 minutes, this facilitated roundtable discussion will provide insight from your employees on where the community is and where it should be heading. Conversations can be held at your company's location, the United Way Plaza, or at one of our nonprofit partner agencies.
- Poverty Simulations: Poverty is a reality for many individuals and families, but unless you've experienced poverty, it's difficult to truly understand. As a unique team builder for your employees, a Poverty Simulation helps bridge that gap from misconception to understanding. It is an interactive immersion experience that will sensitize your employees to the realities of poverty.

LEADERSHIP GROUP INVOLVEMENT

Leadership Groups provide opportunities for you and your employees to meet and network with peers and get more deeply involved through volunteering or attending our many engaging events throughout the year.

Our group involvement: >>

- Women United: a community of women with a mission of inspiring, enabling, and motivating women to become agents of change in our community through philanthropy, leadership, and volunteerism.
- Volunteer Committees determine how to efficiently and effectively invest your contributions into programs that align with the organization's goals toward making the Mid-South even better. Committees also help United Way execute on and raise crucial funds for fundraising drives, special events, community volunteer projects, etc.
- Employee Engagement Champion (EEC) Advisory Council: serves the needs of corporate and employee campaign leaders to increase workplace giving and help meet United Way of the Mid-South fundraising goals.
- Campaign Cabinet: works together to create and implement specific strategies that will bolster workplace, corporate and individual giving strategies. The Campaign Cabinet volunteers are top executives and community leaders who will serve as Division Chairs to set benchmarks, implement strategies and monitor outcomes within their respective areas of expertise.

BLUE TOTE BAG INITIATIVE

United Way of the Mid-South offers a wide variety of high-energy, high-impact volunteer events, designed to be both engaging and inspiring. Sometimes you just can't get away, but you want to serve in some way... Well, we have the answer! Join us in helping build the capacity of our local nonprofit sector and assist those in need through our Blue Tote Bag Initiative.

Contact us at volunteer@uwmidsouth.org to get your bag(s) TODAY!

FOOD/PANTRY DRIVES

Items needed:

Non-Perishable Foods: canned beans, peanut butter, oatmeal, canned juice, canned vegetables, soup, canned tuna or chicken, nuts, shelf-stable milk, whole grain rice and pasta, cereal, olive or canola oil, dried fruits, granola bars, chicken stock, beef and vegetable broth, pudding cups, etc.

Household Supplies: paper products, dish soap, dish towels, cookware, dishes, kitchen utensils, toothpaste, shampoo, soap, etc.

United Way agencies that can use these items:

Catholic Charities, Friends for Life, Feeding Fayette, Olive Branch
Community Food Ministry, Sacred Heart Southern Missions, Samaritans

HYGIENE KITS

Items needed:

Adult Kits: shampoo, soap, washcloths, small make-up bags, toothbrushes, toothpaste, floss, deodorant, lip balm, feminine hygiene products, journal books, pens.

Children's Kits: children's shampoo, brush/comb, small stuffed animals, children's book, crayons, coloring books.

United Way agencies that can use these items:

American Red Cross, Grace House, Fayette Cares, Memphis Recovery Centers, Inc., The Salvation Army, Synergy

SCHOOL SUPPLIES

Items needed:

3-ring binders, calculators, colored pencils, composition notebooks, copy paper, crayons, earbuds, folders with pockets, glue sticks, hand sanitizer, ink pens (black, blue, red), loose leaf paper, pencils, pencil bags, spiral notebooks, tissue.

United Way agencies that can use these items:

School Seed, Local Schools

EARLY CHILDHOOD DEVELOPMENT

Items needed:

Children's books, flashcards, puzzles, board games, educational toys, letter magnets, new stuffed animals, backpacks, arts & crafts kits, dry erase boards and markers, construction paper, crayons and coloring books

United Way agencies that can use these items:

Porter-Leath, Knowledge Quest, LeBonheur Early Intervention and Development, Hope House

DISASTER RELIEF

Items needed:

Diapers, wipes, lip balm, combs/brushes, shampoo/conditioner, deodorant, feminine hygiene products, first aid items, lotion, razors, sanitizers, reusable water bottles, soap, socks, sunscreen, toothbrushes/toothpaste, underwear, washcloths, towels, blankets

United Way agencies that can use these items:

American Red Cross, Fayette County Technical Rescue Team

COMFORT KITS

Items needed:

Sheets, towels, kitchen items, blankets, socks, house slippers, reading glasses, scarves, devotional/inspirational books, handwritten encouraging notes, hand soap, lotion, seasonal items

United Way agencies that can use these items:

Memphis Jewish Home, Meritan, Tipton County and Fayette County Commission on Aging

WEEKEND BACKPACK MEALS

Items needed:

Backpacks, canned proteins (tuna, chicken), peanut butter, granola bars, pudding packs, spaghetti/sauce, canned beans, whole grain rice and pasta, cereal, oatmeal, packaged fruit in water/juice

United Way agencies that can use these items:

Mid-South Food Bank (serving Boys & Girls Clubs, Girls Inc. and others)

BASICS FOR BABIES

Items needed:

New mother books, diapers, wipes, baby ointment, burping cloths, bibs, thermometers, hand sanitizer, tissue.

United Way agencies that can use these items:

Children and Family Services, Harwood Center, Inc., Hope House, Porter-Leath

BEST PRACTICES & 10 STEPS TO SUCCESS

RUNNING A SUCCESSFUL UNITED WAY CAMPAIGN CAN BE A FUN, SIMPLE AND REWARDING EXPERIENCE.

Here are some best practice ideas and steps to get your United Way campaign to succeed. Reach out to your United Way staff for help with planning.



GET CONNECTED

- Contact your United Way Resource Development Manager to learn how they can assist you.
- Talk to your company's CEO or senior leadership about approving a campaign committee, budget, and/or allowing company time for campaign meetings and possible activities.
- Discuss the possibility of matching a percentage of employee gifts with a corporate contribution.
- Develop a strategy for engaging top managers and leaders in the campaign and have them support, endorse and participate in campaign events.
- Understand what employees feel is important in the community and how United Way can make a difference in the Mid-South.



RECRUIT A COMMITTEE AND PLAN YOUR CAMPAIGN

- Build a diverse campaign team including individuals from multiple departments and from every level within the organization, as appropriate. Those with previous United Way involvement would be strong candidates!
- Invite your United Way Resource
 Development Manager to
 campaign committee meetings for questions, ideas and other support.



DEVELOP YOUR CAMPAIGN PLAN

- Set up a campaign timeline. The strongest campaigns are usually the shorter ones - keeping it to a duration of about two weeks is a best practice because it keeps the momentum strong.
- Set a campaign goal. Identify areas that could improve and set measurable goals to achieve. Your United Way Resource Development Manager can help you identify areas of improvement and goals.
- Consider some incentives that can be used to entice new donors and encourage existing donors to increase their contributions.
- Choose campaign strategies and approaches that fit your company culture.
- Develop Leadership Giving strategies that recognize the importance of leadership gifts (\$500 or more) and their impact on our community. Ask the CEO to endorse the importance of leadership gifts and ask him/her or a senior executive leader to spearhead this part of the effort.
- Identify campaign roles and which team members will be responsible for them.
- Make sure to collect all United Way campaign materials from your local United Way Resource Development Manager.



SET A GOAL

 A great way to grow your campaign is to focus on increasing the number of people who are giving and/or encouraging people to give more. Your United Way Resource Development Manager can help you analyze your current giving and create goals make sense. Here are two great formulas to help you set your goal.







LAUNCH AND PROMOTE THE CAMPAIGN

- Promote your upcoming United Way campaign a few days by launching with posters, flyers and various types of communication; for example, a CEO memo on company newsletter.
- Invite all staff to a kickoff event that communicates management support and campaign goals.
 Consider having a United Way speaker at the event.
- Announce the campaign at various department and staff meetings and send out reminders and updates via email.



PRESENTATIONS DURING

- Ask your United Way Resource Development Manager to speak during employee meetings about the mission, programs, resources and impact of United Way.
- Tag on to an existing meeting to make efficient use of company time and keep the United Way segment to 20 minutes or less.
- During the presentation, communicate campaign details such as timeframe, incentives, deadlines, and other events.
- Promote the meeting and presentation to employees. Follow up with employees who missed the meeting or presentation.



PROMOTE LEADERSHIP GIVING

- Discuss Leadership Giving (\$500+) matching opportunities.
- Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO).



MAKE THE ASK

Make sure everyone is asked to give through kickoff, department meetings and one-on-one conversations. The number one reason people don't give is because they were never asked!

- Show donors the impact that their individual contribution makes. Knowing that their gift truly makes a difference in the community is a strong motivation to give back.
- Be prepared to answer questions about United Way to help employees understand how United Way works. Your United Way Resource Development Manager can help you with this part.
- Have the campaign committee personally distribute pledge forms and ask co-workers to join them in supporting United Way. Prepare them to talk about why they support United Way.
- Make sure employees know when the campaign ends, where to turn in their pledge forms, and how they can get more involved.



MONITOR AND REPORT CAMPAIGN PROGRESS

- As the campaign progresses, keep a running total of collected pledges and compare them against the goals identified by the campaign committee.
- Provide regular campaign progress updates to employees through various communications.
- Hold a mid-campaign review to check progress toward goal and identify courses of action to reach your goal.
- Make personal follow-ups with individuals that have not turned in their pledge forms.



CAMPAIGN WRAP-UP

- Tally your results and schedule a meeting with your United Way Resource Development Manager to complete all required paperwork, if necessary.
- Report the campaign final total to all employees and leadership and compare to previous year.
- Hold a final campaign committee meeting to evaluate the campaign efforts and results.
- Distribute any incentives and thank everyone! Send thank-you emails, a thank-you memo from the CEO, and hang thank-you posters. Don't forget to send a special thank-you to the members of your campaign committee!

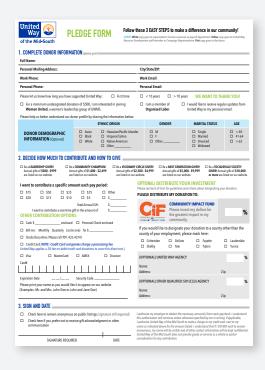


YEAR-ROUND ENGAGEMENT - HAVE FUN!

- Include United Way materials in new hire packets to introduce new employees to the cause and include materials in retiree packets to allow retirees to continue their involvement. Engage your employees with activities that educate about United Way.
- Share United Way of the Mid-South updates and news with employees year-round so they can see the impact of their contributions. Provide special pledge incentives or prizes for people that are first time donors, have increased giving and/or other levels you feel appropriate to award.

ENGAGE • RECRUIT • REVIEW • SET GOALS • PUBLICIZE • EDUCATE • PROMOTE • GIVE • REPORT • HAVE FUN!

PROCESS FOR COLLECTING PLEDGES



THE FOLLOWING INFORMATION IS REQUIRED IN ORDER FOR A PLEDGE FORM TO BE PROCESSED:

- Name and address
- Total annual gift, form of payment (i.e. payroll deduction, credit card, etc.)
- Signature and date
- Email address, so we can send updates on how your donation is being invested in our community

WHO KEEPS WHICH COPY OF THE PLEDGE FORM? (PAPER VERSION)

- White copy goes to your organization's human resources or payroll department
- Yellow copy goes to your United Way Resource Development staff member or Campaign Representative
- Pink copy goes to the donor

WHAT SHOULD I DO AT THE END OF THE CAMPAIGN?

- Compile all pledge forms with payments (if payment is in the form of a check, cash, credit card, place in green envelope)
- Compile all Payroll Deduction Pledge forms in a white envelope
- Double-check to make sure the steps listed above have been completed
- Schedule a pick-up date and time for the pledge forms, donations and other paperwork
- Help complete paperwork on-site if necessary
- Thank the organization for giving!

WAYS TO SAY THANKS

Saying thanks and acknowledging participation are crucial to a campaign's success. Here are a few simple ways companies can thank their organization's Campaign Committee and the people who helped the campaign effort:

- Allow people who return their pledge forms to participate in a casual or jeans day
- Provide employees with paid time off to volunteer with United Way or one of its agency partners
- Hold a company-wide breakfast or lunch; have senior staff serve and thank employees
- Send a thank-you letter from the CEO to campaign committee members and contributors
- Host a special reception or recognition ceremony
- Thank campaign committee members by holding a special coffee break

UNITED WAY WORKPLACE DEVELOPMENT DRIVE CHECKLIST

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	Meet with your United Way representative and begin planning your			
	campaign.			
	Attend United Way's Employee Campaign Conference.			
	Go to uwmidsouth.org for ideas and sample materials.			
	Secure CEO or senior management support.			
	Establish campaign goals like dollar amount and participation percentage.			
Ш	Recruit and train your campaign team.			
GE/	AR UP			
	Establish a timeline for campaign activities.			
	Begin campaign promotion with posters and advance kickoff emails to staff.			
	Send letter from management and organized labor (as appropriate) to			
	employees.	Ctay connected	+ 1	Inited Way
		Stay connected throughout the		
	If applicable, update your online pledge site and/or intranet – consider	-	-	ıwmidsouth.org
	adding United Way program information.	about our worr	l al l	iwiiiusoutii.oi
RUI	V	Follow us on:	_	
	Conduct a pacesetter campaign for leadership givers. Ask your United Way	Facebook	f	uwmidsouth/
	staff member for information.	Instagram	0	uwmidsouth/
	Hand out pledge forms and/or email information about online giving to	Twitter	Y	uwmidsouth/
	employees.	LinkedIn		
	Send follow-up emails every few days to keep up enthusiasm. Include	Linkeam	ш.	company/ uwmidsouth
	updates, news and success stories.			uwiiiusoutii
	Find stories about what United Way is doing at uwmidsouth.org/news.			
	Hold meetings and fundraising events (e.g. bake sale, raffle, soup contest).			
	Give employees the opportunity to learn more about United Way by			
	coordinating speakers, volunteer activities or agency tours.			
CLC	OSE			
	Send a reminder email that your campaign is concluding and pledge forms			
	need to be submitted.			
	Collect pledge forms.			
	Submit contribution forms and final reports/data to your payroll department.			
	Announce campaign results to your employees.			
	Thank employees with a celebration event, letter, email, etc.			
	Thank your campaign team, leadership contributors and other special groups.			
	Gather feedback and notes for next year.			
	Choose an Employee Engagement Champion, set next year's kickoff date, and			
	provide this information to your United Way representative.			

SAMPLE LETTERS TO ENCOURAGE SUPPORT

LETTER FROM CEO TO EMPLOYEES (SAMPLE 1):

Dear:	Dear:				
(Employee Name Here)	(Employee Name Here)				
As you know, our company has supported United Way of the Mid-South for many years. Its work to address our local poverty problems is important to making the Mid-South an even better place to work and live.	We all wear a number of different hats in our daily lives – we're alternately spouse, parent, employee, union member, citizen. Successfully juggling these roles is a tough job because each role requires decisions and actions.				
Last year, your support of United Way made a meaningful impact more than 300,000 times throughout our eight-county	Each year, we're asked to wear yet another hat, that of United Way contributor. It's one of the nicer roles we get to assume!				
area. During the next few weeks, you will be hearing a great deal about United Way services and programs.	As United Way contributors, we don't need to make a lot of difficult decisions about who needs the most help – United Way volunteers have already done that. They've spent				
United Way represents the largest and most efficient system of providing people-to-people help. Through United Way, local agencies and services receive the support and assistance they	countless hours studying local needs, determining what agencies best meet those needs and distributing funds accordingly.				
eed to help countless people – the physically disabled, the ick, the aged, the young, the mentally ill, as well as those who ave no other place to turn.	Last year, your support of United Way made a meaningful impact more than 300,000 times throughout our eight-county area.				
In support of this very important effort, you will be asked to attend a United Way presentation at which time you will be asked to pledge a contribution to United Way. Your contribution is a personal decision, but I hope that you will be generous, as our employees have been in the past.	When we give to United Way, we know our money is going where it can help most. And we know our contribution keeps on working 365 days a year. With payroll deduction and United Way, giving – and helping – has never been easier.				
Through our payroll deduction plan, you have a convenient, easy and practical way to make your contribution.	We hope you'll continue supporting United Way as you have so generously done in the past.				
I have made a pledge to United Way, and I hope you will give strong consideration to doing the same.	Sincerely,				
There are many people who need the help that we can give.	(CEO Name Here)				
Sincerely, (CEO Name Here)					

LETTER FROM CEO TO EMPLOYEES (SAMPLE 2):

SAMPLE LETTERS TO ENCOURAGE SUPPORT

LETTER FROM ORGANIZED LABOR:

Dear Brothers and Sisters:

The labor movement and United Way have a lot in common. Both exist to help people. Both have the support of working men and women throughout the country. And both believe that every individual should be treated with dignity and respect.

Last year, your support of United Way made a meaningful impact more than 300,000 times throughout our eight-county area.

For over a century now, people have given their time and money to study local needs and have done their best to meet those needs through United Way. The result is one of the finest voluntary efforts in the world.

Our United Way is addressing the tremendous challenge of local poverty by creating targeted results in education, financial stability and health. Its focus is to advance the common good for all. To do that, United Way needs to increase its financial resources and to increase the number of people who serve as volunteers.

When you are asked to give to United Way this year, please be generous. Thousands of people right here in the Mid-South depend on your support. And if you have ever thought of volunteering, I encourage you to do so now. Volunteer opportunities abound. If you already volunteer, recruit a friend to join you. That way, you've made your own contribution to increasing the number of volunteers here in the Mid-South.

We may never have all the resources we need to solve all the problems that need attention. But United Way volunteers make sure we use our limited resources as wisely as possible. This United Way has been doing that for nearly 100 years.

With your help, United Way can continue in the years ahead to serve the needs in our community and all over America.

Sincerely,

(Organized Labor Leader Name Here)

LETTER TO RETIREES:

Dear Fellow Retiree:

As retired employees of [COMPANY], we are fortunate. Our careers have blessed us with the numerous rewards we enjoy today. This year, we can share our good fortune with others through United Way.

What we give to United Way is only part of what it takes to provide health and human-care services to hundreds of people each day. Yet, to those in need, it makes all the difference in the world.

Last year, your support of United Way made a meaningful impact more than 300,000 times throughout our eight-county area.

Giving through United Way is the best way to help the most people. The needs of people in the Mid-South change all the time. United Way and United Way-supported organizations are working to discover and help fill these needs. One of the fastest growing segments of this nation's population is its senior citizens, and many United Way supported organizations are in the forefront of the effort to address the needs of this special group. So you can see why our financial support is so important.

But there's another way we can help – by giving our time. What better way to fill our leisure time than by caring for others. You get a lot in return.

People helping people . . . United Way's campaign helps keep this spirit alive in the Mid-South. Let's help United Way continue to work for all of us.

Together, we do make the difference.

Sincerely,

(Retiree Leader Here)

These letters are only offered as suggestions - they can be modified to fit the culture of your organization as necessary. Please feel free to contact your United Way staff representative to provide guidance and/or assistance in the composition of letters on behalf of United Way.

UNITED WAY

FREQUENTLY ASKED QUESTIONS

There are questions we often encounter, and if handled well, these can be great opportunities for providing information about United Way. People are usually willing to participate in a campaign when they have the information they want, so please review these helpful notes and share these answers as questions arise.

WHAT DOES UNITED WAY DO?

ANSWER: United Way of the Mid-South is helping more people escape generational poverty by making strategic investments in our community and improving people's lives. We're creating lasting, community-level changes to help local individuals and families enjoy a better quality of life. Our strategies include leading cross-sector collaborations, advocacy for public policy changes, and funding direct services and programs provided by human service partner agencies.

WHERE DOES UNITED WAY FOCUS?

ANSWER: We're leading the fight against poverty and our *Driving The Dream* initiative helps more people escape generational poverty so they can live the life of their dreams. Our system of care is creating improvements for people's quality of life through economic and social mobility.

WHY IS UNITED WAY THE BEST WAY TO MAKE THE BIGGEST DIFFERENCE?

ANSWER: United Way has the scope, expertise and influence to bring together hundreds of human service agencies, government, corporations, private foundations, and dedicated volunteers around a common vision of creating maximum impact and achieving long-lasting results.

- We identify, understand and prioritize ongoing and emerging human service needs.
- We recruit the people and organizations who bring the passion, expertise and resources needed to get things done.
- We are trusted by our partners and the community because we ensure transparency, efficiency and accountability in our work.

WHY SHOULD I GIVE TO UNITED WAY?

ANSWER: Your gift makes an impact on our single most significant issue: poverty. It supports hundreds of vital services available to people in the Mid-South. To ensure that your money is well-spent for the most critical needs in our community, teams of knowledgeable volunteers who live and work in the Mid-South make decisions on where the money is spent to help the most people in need.

HOW DID UNITED WAY OF THE MID-SOUTH RESPOND DURING THE COVID-19 PANDEMIC?

ANSWER: As the critical nature of the COVID-19 pandemic became evident in our community, United Way of the Mid-South quickly stood up our COVID-19 Economic Relief Fund. The United Way of the Mid-South (UWMS) COVID-19 Economic Relief Fund was designed specifically to support nonprofit agencies as they perform their critical services for our most vulnerable Mid-South neighbors. This Fund continues to meet the needs of the region's health and human service organizations which experienced a surge in demand for support from neighbors and communities significantly impacted by this pandemic.

United Way's COVID-19 Economic Relief Fund has a three-fold purpose: to provide immediate support to nonprofits addressing the most critical community needs related to the pandemic; to provide long-term recovery support to UWMS partner agencies in their continued and even more vital work; and to provide critical and timely support to UWMS for our adaptive response efforts to meet the ongoing influx of need in our community.

An additional, innovative component of our immediate responsiveness to individuals and families impacted by COVID-19 is United Way's Relief Call Center powered by *Driving The Dream* - implemented to connect callers to critical services, partner agencies and employment resources. United Way's Relief Call Center has the capacity to put callers in contact with multiple agencies without individuals having to repeat the circumstances for the call.

Finally, United Way of the Mid-South's Free Tax Prep program created an innovative, low-risk alternative when its sites were forced to close: the Drive-Thru Drop-Off tax preparation option. This option allows filers to submit their tax return documents to process their refunds without ever leaving their vehicle, meeting social distancing guidelines.

HOW DOES UNITED WAY DEMONSTRATE ITS ACCOUNTABILITY?

ANSWER: United Way is the largest, public charitable foundation in the Mid-South. United Way is the leading the way for corporations, individuals, groups and agencies can make a difference in our community, and we support high-performing, human services agencies to boost prosperity for individuals and families through our Community Impact Fund and our *Driving The Dream* initiative.

WHAT ARE UNITED WAY'S OVERHEAD COSTS?

ANSWER: United Way of the Mid-South's operating overhead is 16.9%, which means that 83¢ of every dollar raised is invested in the fight against poverty.

CAN I GET HELP FROM A UNITED WAY AGENCY? CAN ANYONE?

ANSWER: Yes. The vital services provided by agencies are available to everyone without regard to economic status, race or religion. In some rare cases, services may be limited based on government-imposed eligibility requirements.

DO UNITED WAY AGENCIES CHARGE FEES FOR THEIR SERVICES?

ANSWER: Some do, and some don't. Those who do charge generally base their charges on the individual's ability to pay, and that sum is always far below actual costs.

DO YOU HAVE A SERVICE FEE FOR THOSE DONATIONS DESIGNATED TO AGENCIES?

ANSWER: No, we convene these entities for the greatest good, and while undesignated funds fuel the Community Impact Fund, we don't charge a service fee for funds designated to other organizations.

WHO DECIDES WHO GETS UNITED WAY CONTRIBUTIONS?

ANSWER: Trained Volunteers. Every year these volunteers make the tough decisions – decisions that touch thousands of lives and involve millions of dollars. They visit agencies, review budgets and make sure every dollar goes to programs that have the greatest impact on Mid-South lives.

WHY NOT JUST GIVE DIRECTLY TO THE AGENCIES?

ANSWER: There are several reasons why United Way is among the best ways to give to charity:

 United Way's community-based oversight assures donors that the charities you support through United Way adhere to sound fiscal policies, provide needed services, and achieve results.

- Giving through United Way reduces costly and time-consuming fundraising efforts for agencies, so their time can be spent helping others.
- Giving through United Way supports a network of agencies that work together in our battle against Mid-South poverty.
- Most companies offer payroll deduction to divide your gift into smaller donations.

Together, we can do more good than anyone of us can do alone.

HOW ARE UNITED WAY AGENCIES ACCOUNTABLE TO UNITED WAY DONORS?

ANSWER: Every United Way agency meets these high standards to assure you of quality and efficiency:

- Recognized by the IRS as a nonprofit 501(c)(3)organization.
- Governed by a volunteer board of directors.
- Provides for a human care need and measures those results.
- Audited regularly by an independent CPA firm.
- Submits annual financial statements.
- Presents and defends their organization's budget to a panel of community volunteers.
- Operates at a reasonable cost.

Experienced community volunteers oversee the distributions to all agencies, review financial reports and annual audits, conduct on-site visits and monitor programs to assure quality.

DO THE AGENCIES GET GOVERNMENT FUNDING?

ANSWER: Many agencies receive government support, primarily through grants. In fact, United Way funding is often used by agencies to generate matching government funds with agency resources. However, shrinking government dollars available to agencies can threaten their financial stability, which means that privately funded sources like United Way are more important than ever.

WHY DOES UNITED WAY SUPPORT SOME AGENCIES THAT ARE AFFILIATED WITH RELIGIOUS GROUPS?

ANSWER: United Way supports agencies because they provide services to people who need them and create meaningful results in our battle against poverty. The agencies affiliated with religious groups provide services to all people, regardless of religious affiliation. United Way of the Mid-South recognizes the rights of all people and does not, in any way, discriminate against any person or organization because of race, religion, gender, age, national origin, disability, socioeconomic status, political preference or lifestyle. In all of our funding policies and employment practices, we strive to be both fair and equitable.

DOESN'T CHARITY BEGIN AT HOME?

ANSWER: Yes, it does. "Home" is not only the place where we reside – it is the community that surrounds us, and the people that make up that community. Working together works for the betterment of everyone.

WHAT IF MY SPOUSE GIVES FOR ME?

ANSWER: Family finances and giving are very personal matters. Each person decides if he or she wants to help by being personally involved. More people can be helped if more people give.

IF I GIVE TO MY CHURCH, WHY DO I NEED TO GIVE TO UNITED WAY?

ANSWER: Most people who give to charity also give to their church, synagogue or house of worship. Studies have shown that people who participate in faith-based worship on a regular basis also give more to charity and are more likely to volunteer. By giving to United Way, you are supporting high-performing agencies who have widespread impact and touch thousands of people including many Mid-Southerners of faith - in a variety of ways.

HOW DO I KNOW MY GIFT REALLY MAKES A DIFFERENCE?

ANSWER: United Way volunteers focus on community needs and program results when making funding decisions. You can serve on a volunteer committee to decide how to best distribute the funds raised. An interesting thing happens when the people who give money are also in charge of determining the best funding uses for it – they work hard to make the right decisions!

I KNOW SOMEONE WHO ASKED FOR HELP AND DIDN'T GET IT - WHAT'S GOING ON?

ANSWER: United Way helps make sure that programs throughout the community have the resources they need to serve people and address challenges. Needs always exceed the dollars available to meet them; unfortunately, some people don't get the help they may desperately need. United Way agencies served thousands of people in the Mid-South last year. If more people give, waiting lists can be reduced and programs can be expanded to serve more people with agency resources. However, shrinking government dollars available to agencies can threaten their financial stability, which means that privately funded sources like United Way are more important than ever.

DOES THE MONEY STAY LOCAL?

ANSWER: Yes. By designating your funds to the Community Impact Fund in the county of your employment or residence, local volunteers in your community work with United Way staff to determine the most effective way to deploy these resources to benefit individuals and families

HOW CAN PEOPLE PARTICIPATE?

When we LIVE UNITED, whatever the problem facing our community, we can create real change.

- **GIVE** Invest in the best way to make the biggest difference.
- **ADVOCATE** Be informed and speak out on issues that matter to you.
- **VOLUNTEER** Put your talents to work.
- **ENGAGE** Join others to bring positive change.

United Way of the Mid-South received a 4-star rating from Charity Navigator. This designation means that we have shown our donors and constituents that we are accountable, transparent and financially healthy.

Together, we can do more good than any one of us can do alone.

REMEMBER

Answering questions courteously, quickly, and thoroughly can make the difference between building trust with a donor or losing a donation and possibly starting incorrect rumors.

2020-21 UNITED WAY OF THE MID-SOUTH

COMMUNITY IMPACT FUND AGENCIES

WHEN YOU GIVE TO UNITED WAY OF THE MID-SOUTH'S COMMUNITY IMPACT FUND, your support has its greatest impact. Helping United Way in **Driving The Dream** ensures more people escape generational poverty and live the life of their dreams. These United Way agencies and their programs improve education, financial stability, and health - boosting our local economy by reducing poverty, one person at a time. When you give to the Community Impact Fund, you're providing vital funding to the work of these agencies. Thank you!

Alliance Healthcare Services Alpha Omega Veterans Services, Inc. American Red Cross, Mid-South Chapter

Binghampton Development Corporation*

Boy Scouts of America, Chickasaw Council

Boy Scouts of America, West TN Area Council

Boys & Girls Club of the Hatchie River

Boys & Girls Clubs of Greater Memphis **BRIDGES USA**

Catholic Charities of West Tennessee Children & Family Services, Inc. Coldwater Volunteer Fire Department

Community Foundation of Northwest Mississippi - Hernando Excel By 5

DeSoto County Foundation for Excellence in Education, Inc.

DeSoto County Literacy Council, Inc.

Dewitt Community Coalition, Inc. District One Volunteer Fire Department

East Arkansas Youth Services

Exchange Club Carl Perkins Center for the Prevention of Child Abuse

Family Biz Builder

Families in Transition, Inc.

Fayette Cares, Inc.

Fayette County Commission on Aging Fayette County Schools Alumni

Association, Inc.

Fayette County Technical Rescue Team,

Fayette Literacy

Frayser Community Development

Corporation Friends For Life Corporation

Girls Inc. of Memphis*

Girl Scouts Heart of the South Good Neighbor Love Center, Inc.

Goodwill Homes Community Services,

Grace House of Memphis, Inc.

Harwood Center, Inc.

Healing Hearts Child Advocacy Center

Historic DeSoto Foundation

Hope House Kindred Place

Knowledge Quest, Inc.

LaGoshen Family Life Center

Latino Memphis

Lauderdale County Family Resource

Center

Le Bonheur Early Intervention and

Development

Legal Aid of Arkansas, Inc.

LINC/2-1-1

Literacy Mid-South*

Lowenstein House, Inc.

Madonna Learning Center, Inc. Memphis Child Advocacy Center

Memphis Crisis Center

Memphis Jewish Community Center

Memphis Jewish Home & Rehab Memphis Oral School for the Deaf Memphis Recovery Centers, Inc.

Memphis Urban League, Inc.

Meritan, Inc.

Nelson Resource Center

Olive Branch Community Emergency

Food Ministry, Inc.

Porter-Leath

Sacred Heart Southern Missions, Inc.

Samaritans

Search Dogs South

Southwest Human Resource Agency Special Olympics, Greater Memphis

Synergy Treatment Centers

Tennessee Poison Center

The ARC of Northwest Mississippi

The Baddour Center

The Salvation Army Memphis &

The Mid-South

Tipton County Commission on Aging

United Housing, Inc.*

YMCA of Memphis & the Mid-South

Youth Villages*

YWCA of Greater Memphis

* United Way Endorsed Agency Current as of July 2020



DRIVING THE DREAM AGENCIES

Driving The Dream (DTD) is aligning resources in a manner that unites local agencies in a "no wrong door," collaborative effort to help Memphis' and the Mid-South's most economically challenged individuals advance toward economic selfsufficiency and other life goals they identify. These DTD partner agencies and their programs improve education, financial stability, and health-boosting our local economy by reducing poverty, one person at a time.

2Unique Community Salvation Foundation Agape Child & Family Services Alliance Healthcare Services Alpha Omega Veteran Services, Inc. American Red Cross, Mid-South Tennessee

Anaya Partnership/Youth Villages Bethany Christian Services

Big Brothers Big Sisters of the Mid-South

BRIDGES

Catholic Charities of West Tennessee,

Center for Employment Opportunities Center for Transforming Communities Church Health Center Collierville Literacy Council

Communities In Schools Community Legal Center DeNeuville Learning Center **Dress for Success Memphis** Early Success Coalition **Economic Opportunities** Families Matter Frayser Community Development Corporation

Goodwill Homes Community Services,

Grace House of Memphis, Inc. Harwood Center, Inc.

HopeWorks

Integrated Addiction Care

JIFF, Inc.

Kindred Place

Knowledge Quest Latino Memphis

LifeLine to Success

Living Grace Memphis Madonna Learning Center

Memphis Child Advocacy Center Memphis Crisis Center

Memphis Dream Center

Memphis Jewish Community Center Memphis Recovery Centers

Memphis Scholars South Campus Shelby County Office of Reentry

Memphis Urban League, Inc. Meritan, Inc.

Metropolitan Inter-Faith Association

Mid-South Veteran's Helpdesk

Mind Renewals, Inc. Neighborhood Christian Centers, Inc. New Ballet Ensemble & School

One by One Ministries Pathways In Education

Porter-Leath Progeny Place

Promise Development Corporation

Raleigh Community Christian Child Care Center

Refugee Empowerment Program

RISE Foundation

Seedco

Shelby County Schools

Shelby County Schools (Office of Early Childhood)

Shelby Residential Vocational Services

(SRVS) STS Enterprise Corporation

Synergy Treatment Centers Tech 901

The Excel Center The Hospitality HUB

The Salvation Army **UCAN** of Memphis

United Housing, Inc.

Urban Strategies, Inc. WorkSteady Works, LLC

YMCA of Memphis & the Mid-South

YWCA of Greater Memphis

TOGETHER, WE CAN DO MORE GOOD THAN ANY ONE OF US CAN DO ALONE.

FOR QUESTIONS CONTACT:

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