



Capital Area United Way 2023 ECC Training

**UNITED IN
PURPOSE**





Agenda

Part 1

- **Welcome**
President & CEO of Capital Area United Way
- **About Capital Area United Way**
- **Community Impact Work during the Pandemic**

Part 2

- **Workplace Giving Campaign**
- **Employee Campaign Coordinators**
- **Conducting the Capital Area United Way Campaign**
- **Leadership Giving**
- **Special Events**
- **Sponsorships & Grants**
- **Campaign Timeline**
- **Resources & Materials**



Our Mission

Is to improve lives by leveraging partnerships in our community to advance the common good through education, income stability, and healthy living.



Our Vision

is a community where everyone is empowered to achieve their full potential.



Diversity Statement

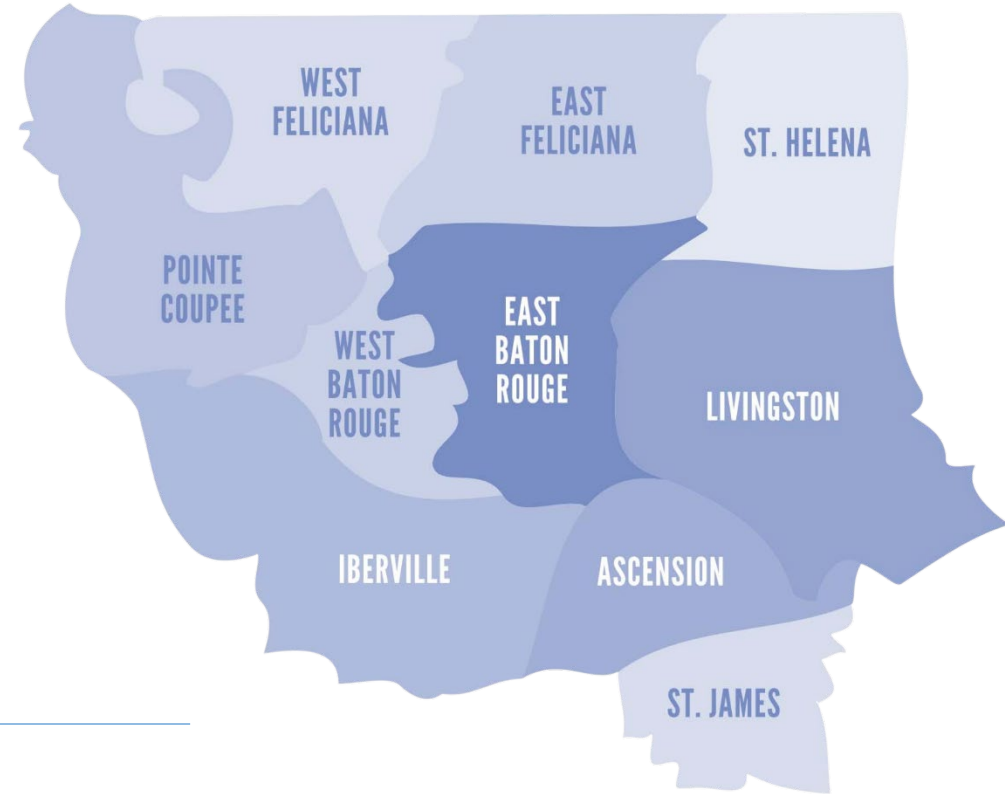
Capital Area United Way values diversity and desires to promote respect for the dignity of all people without regard to race, creed, color, religion, marital status, sexual orientation, disability, gender, age, or national origin. United Way promotes the full realization of this policy through the positive recognition of the value of diversity.

www.cauw.org





Our 10 Parish Service Region





Capital Area United Way



Who We Help: ALICE



ALICE IN LOUISIANA

ASSET LIMITED

Households may not own a home or car, lack savings, and are one emergency away from financial crisis.

INCOME CONSTRAINED

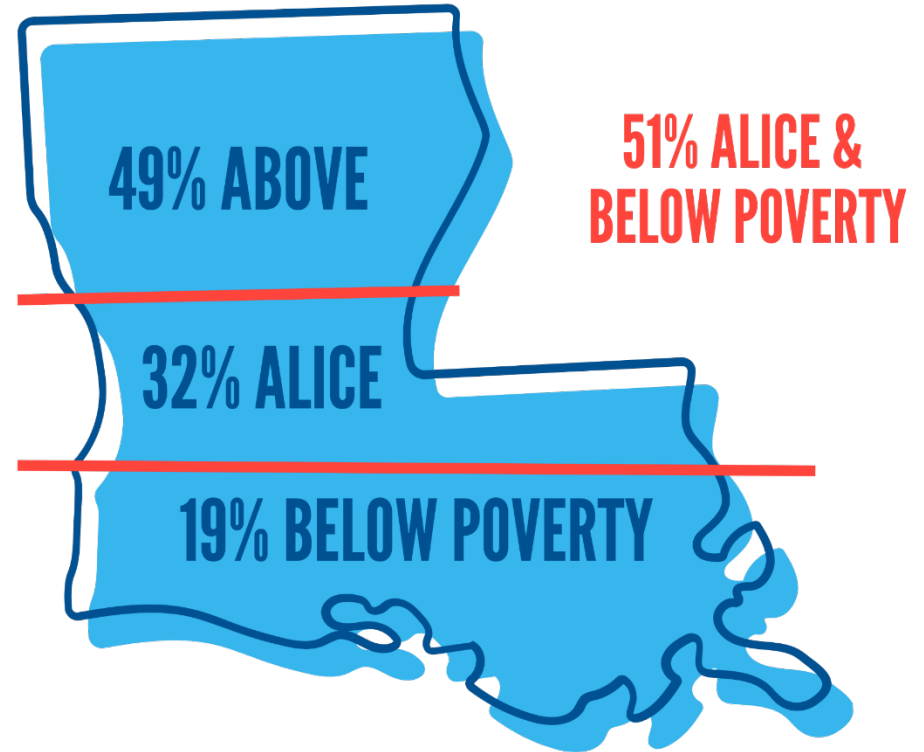
Households fall below the ALICE threshold, meaning they don't have enough to make ends meet.

EMPLOYED

Households are working or have worked, but are not earning enough income for basic economic survival.

\$66,288
Household
Survival Budget
Line

\$26,500
Federal Poverty
Line





Capital Area United Way



Our Impact: 3 Key Focus Areas





Health

Being healthy includes physical, mental, and social well-being. United Way focuses on community need including efforts to improve maternal and child health, increase access to healthy food, boost mental health support, ensure safe drinking water, and more.



Education

Education is the key to opportunity and every child deserves the chance to receive a quality education. United Way helps more children access early childhood education, have the support they need to succeed in school, and be prepared for college and career.



Economic Mobility

United Way is focused on economic mobility, helping people and families to be financially secure. Across the world, we're working in communities to ensure people have access to skill building and career opportunities that provide benefits, the opportunity for increased wages, career advancement, and more.



Capital Area United Way



How We Help: Competitive Grants





2022-2023 Grants Summary

- **42 Total Project Grants**
 - (2022-23) \$612, 565 distributed
- **21 Innovation Grants**
 - (2022-25) \$1.5 million per year in Education, Health, and Economic Mobility.
- **23 Basic Needs Grants**
 - (2022-23) \$1,089,136.96 million distributed
- **6 Community Responsiveness Grants**
 - (2022-23) \$67,000 distributed



Grant Review

Volunteer Opportunities

- **Project-Based Funding**
 - Evaluate applications 2-3 times a year
- **Disaster/Crisis Funding**
 - Evaluate applications as needed



Capital Area United Way



How We Help: Community Initiatives





211/CAUW

Areas of Emphasis:

1. 24/7 Information & Referral
2. Care Coordination
3. Crisis Intervention
4. Disaster Support Services



BANK ON BATON ROUGE

Areas of Emphasis:

1. Second Chance Bank Accounts
2. Financial Literacy Education
3. Exploring Financial Technology Programs





SingleCare Prescription Savings Card

Providing community members with access to affordable prescription medications, ensuring greater health and financial stability



SingleCare®



United We Feed

Fresh produce distributions to the ALICE population





United 4 Vets

Aims to coordinate, streamline, and provide wraparound services to veterans and their families.



VITA (Volunteer Income Tax Assistance)

Free tax preparation for low to moderate income individuals and families





Capital Area United Way



The Workplace Campaign





The Workplace Campaign

Capital Area United Way's workplace campaign is the backbone of our fundraising, traditionally comprising over 90% of the funds raised.

A workplace campaign is

- a coordinated fundraising effort that takes place over a set period
- a way for employees to give through payroll deduction and create a bigger impact with their giving
- a great way to engage employees and coworkers and promote team-building
- an opportunity to thank current workplace campaign partners, volunteers and donors for their efforts
- a chance to share the impact donors' gifts have had over the past year





Employee Campaign Coordinators

The Employee Campaign Coordinator (ECC) is a volunteer within the workplace who coordinates the Capital Area United Way (CAUW) campaign. They are the heart of the campaign!

ECC responsibilities include:

- Becoming educated about CAUW's programs, project, and grants
- Working with company management and CAUW staff
- Developing a campaign plan including dates, goals, incentives etc.
- Recruiting a team to assist with the campaign (recommended is 1 per 25 employees)
- Coordinating employee meetings and CAUW presentations
- Distributing CAUW materials
- Promoting the CAUW campaign within the workplace
- Collecting employee pledges and reporting back to CAUW staff (recommended within 2 weeks after campaign end)
- Distributing t-shirts and other company incentives
- Thanking your coworkers and team members for participating
- And just have fun!



10 Best Campaign Practices

1

BUILD A RELATIONSHIP WITH CAPITAL UNITED WAY STAFF

Capital Area United Way Staff will help you assess the strengths of last year's campaign and suggest areas for growth. They will be with you every step of the way.

2

SECURE TOP-LEVEL SUPPORT

The success of your campaign depends on the commitment and involvement of your CEO or Local Senior Manager. Keep your management team involved by asking them to:

- Establish a budget for campaign events, materials, and incentives
- Confirm a corporate contribution
- Endorse the campaign through personal letters or e-mails
- Authorize payroll deduction, if this does not already exist
- Personally, pledge a leadership gift



10 Best Campaign Practices

3

DEVELOP A PLAN AND SET GOALS

The most successful CAUW campaigns have measurable goals. Work with your staff member to analyze the results of last year's campaign and set goals based on where you can make the greatest improvements.

4

ORGANIZE A TERRIFIC TEAM

The Team will help manage the organization's campaign and communicate with employees about CAUW. Ask your CEO, LSM, department heads, or supervisor to recruit well-respected, friendly, outgoing employees from all levels and sites of your company. The team members coordinate efforts to educate fellow employees about CAUW, build excitement for the campaign, answer colleagues' questions about United Way, and make sure that everyone is asked to give.



Campaign Planning Worksheets

TOGETHER WE FILL THE GAP

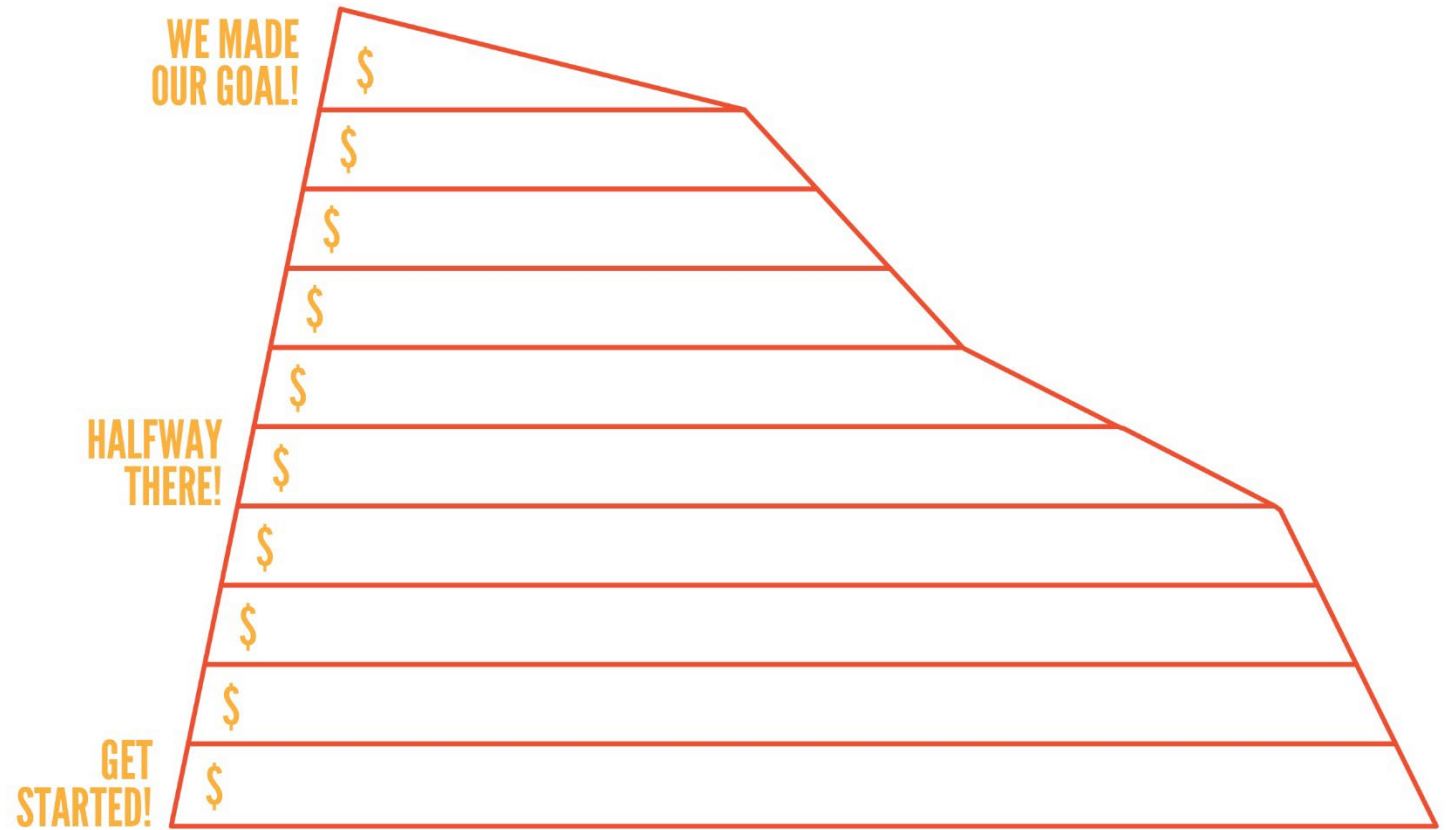
OUR ACCOMPLISHMENTS & GOALS

2022-2023

2023-2024

% PARTICIPATION: _____

DOLLAR AMOUNT GOAL: _____





5

PROMOTE AND PUBLICIZE THE CAMPAIGN

Education and information are the keys to reaching your campaign goals. CAUW can help you create an atmosphere of contagious enthusiasm as you educate employees about how their contributions help CAUW improve lives in our community. Some of the successful promotional tools include but are not limited to:

- CAUW Videos
- Employee testimonials - this is a great opportunity to seek out employees and to publicize how your own employees **LIVE UNITED**
- Creative, engaging campaign themes
- Visit our United Way Website: <https://www.cauw.org>
- Visit our Resource Center: <https://www.cauw.org/resourcecenter>
- Employee publications, voice-mail announcements, or goal thermometers
- Incentives for turning in pledge cards or giving through payroll deduction
- Special events and fun activities to add an additional spark to your campaign, in addition to educational meetings and other best practices





10 Best Campaign Practices

6

MAKE THE ASK

This by far is the most important step. It is important to allow every employee to make an educated, personal decision about giving to CAUW. There are two effective ways to do this:

1. Educate employees through employee meetings
2. Education of employees one-on-one, virtual, or hybrid – CAUW staff is here to assist you

7

LEADERSHIP GIVING

An employee campaign that strongly encourages Leadership Giving is likely to be a robust campaign. Peer-to-peer solicitation and personal asks are critical to the successful cultivation of these gifts.

Gottlieb Leadership Society - Members of this society give gifts of \$ 1,000 -\$9999

Tocqueville Society - Members of this society give gifts of \$10,000 or more



10 Best Campaign Practices

8

WRAP UP AND REPORT OUT

These steps will save time and ensure accuracy during the completion of the company results reporting process.

- Determine how you will collect all pledge forms as well as checks, cash, and credit cards
- Train your team on the pledge form collection process before the forms arrive at the collection site
- Have your team verify that all pledge forms have been completed accurately

9

RECOGNITION AND THANK YOU

“Thank you”! These two simple words not only show appreciation, but also set the tone for year-round communication and continuous giving. There are many ways to thank your fellow employees, including a personal thank you or a small gift of appreciation. The importance of thanking everyone involved—from those who created a poster to those who collected pledge cards cannot be overemphasized. Sponsor a breakfast, luncheon, build your own sundae bar, or reception to thank employees.



Thank You Examples

Thank You Cards – Use your company’s campaign theme and find a creative way to deliver the cards to make a lasting impression: deliver cards with a candy kiss or balloon attached, insert cards into pay envelopes or personally hand cards to employees as they enter a thank you event.

Thank You Awards – Recognition of groups, departments, individual contributors and volunteers can take many forms: plaques, certificates, trophies or medals, paperweights, desk sets or other gift items. Consider using items from the United Way Store. Be creative.

Thank You Events – Special events are a meaningful way to wrap up a campaign and show contributors and campaign workers that their efforts are appreciated. Consider a thank you breakfast, or lunch hosted by Senior Management, victory rally, thank-a-thon personal telephone calls to contributors, ice cream social, employee barbecue or picnic.

Thank You Gifts – The best advice is to keep things simple as you let donors know that their contributions are appreciated.

- Gift certificates from the company store, local business, and restaurants
- Candy or baked goods
- Flowers, buttons, ribbons
- Campaign theme pins, key chains, pens mugs
- Extra PTO day
- Prime Parking Space
- Car Washes
- T-Shirts



10 Best Campaign Practices

10

YEAR-ROUND ENGAGEMENT

GIVE

Give to invest in your community. When you donate to Capital Area United Way, you are making a difference in lives.

ADVOCATE

Advocate to share your voice. Capital Area United Way is creating a lasting change in communities around the world, but we can't do it alone.

VOLUNTEER

Volunteer to lend a hand. Join those in our Capital Area who are giving back so others can get ahead.



Special Events

Great **FUNdraising** ideas for your campaign! It's been proven...Capital Area United Way Campaigns are fun when you incorporate special events to raise additional funds for the community. If you want a campaign that has a boost of excitement and provides an opportunity for camaraderie for the employees of your organization, then fundraisers are for you. All events would have an entrance fee, participation fee, raffle ticket fee, and food items would be sold.

How about:

- Bake Sale
- Cake Walk
- Jambalaya or Chili Cook-Off
- Hot Dog or Nacho Party
- Executive Car Wash (have your boss wash your car)
- Silent or Live Auction or White Elephant Sale
- Golf Tournaments
- Jelly Bean Jar, Ring Toss, Dunk Tank, Cornhole, Fun Games
- Cornhole Contest
- Trivia Contest
- Picture with your Pet Contest
- Casual Day



Grants & Sponsorships

Capital Area United Way works with companies, governments, nonprofits, and other organizations to address complex challenges in our community. Our partners contribute the financial resources necessary to fund our work in addition to workplace campaign. In addition to financial support they also share ideas, volunteer power, in-kind support, and more are helping build stronger communities.

A listing of all sponsorship and grant opportunities can be found at www.cauw.org/resourcecenter



Campaign Checklist

- | | | | | | |
|--------------------------|-----------------------------|--|--------------------------|----------------------------|--|
| <input type="checkbox"/> | 1 TO 4 MONTHS BEFORE | Meet with your CRM to create new strategies for your campaign. (Include the team) | <input type="checkbox"/> | THROUGHOUT CAMPAIGN | Host employee education meetings and events throughout the campaign |
| <input type="checkbox"/> | 1 TO 4 MONTHS BEFORE | Determine the dates for your campaign and set fundraising and/or participation goals | <input type="checkbox"/> | THROUGHOUT CAMPAIGN | Share progress toward your goals with your team |
| <input type="checkbox"/> | 1 TO 4 MONTHS BEFORE | Select theme, speakers and kickoff date | <input type="checkbox"/> | 1 TO 3 DAYS AFTER | Announce and celebrate your results |
| <input type="checkbox"/> | 4 WEEKS BEFORE | Have all supplies including FAQ's & Parish Impact flyers printed or ready | <input type="checkbox"/> | 1 TO 3 DAYS AFTER | Thank your donors and campaign team members for their support |
| <input type="checkbox"/> | 4 WEEKS BEFORE | Coordinate campaign messaging and develop a timeline for company-wide distribution | <input type="checkbox"/> | 1 TO 2 WEEKS AFTER | Finalize campaign results and contact your RDT Member to pick up results |
| <input type="checkbox"/> | 4 WEEKS BEFORE | Implement a Day of Impact/Action either onsite, offsite, or virtually to demonstrate the impact their donation to CAUW | | | |
| <input type="checkbox"/> | DAY 1 OF CAMPAIGN | Host a general employee kickoff event with company leadership in attendance or as speakers (this can be pre-recorded) | | | |



Campaign Materials & Resources

All CAUW Campaign Materials & Resources can be found at:

[Capital Area United Way Resource Center | Capital Area UW \(cauw.org\)](https://cauw.org)





Capital Area United Way



Comments From Previous ECCs



Questions & Answers





2023 Resource Development Team Members

Thank You!

We offer up a special Thank You from our **President & CEO, George Bell**, along with a sense of gratitude from our Resource Development Team:

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Thank You!

for joining us in our 99th year serving our community!



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PURPOSE



Capital Area United Way