

CAMPAIGN TEAM GUIDE 2020-2021



**ARE YOU AN AMBASSADOR,
AN ORGANIZER,
A MOTIVATOR,
OR A STORYTELLER?**

We need you on our team!
After all, we can do so much
more when we do it together.

Help us bring the work of Trident United Way to life! As we manage daily life in a mostly virtual community, we need your help more than ever to spread the word about our work during virtual meetings and discussions with your colleagues.

As part of your company's Trident United Way campaign team, you'll educate your peers about Trident United Way and inspire them to invest in what matters.

Inside you'll find five easy steps to help you make a big difference.

WELCOME TO THE TRIDENT UNITED WAY TEAM!



GIVE. ADVOCATE. VOLUNTEER.

WHO WE ARE/WHAT WE DO

TOGETHER WE ARE WORKING TO:

IMPROVE EDUCATIONAL OUTCOMES FOR ALL STUDENTS.

The process to improve educational outcomes for all students starts well before day one of kindergarten. Every child will be supported from birth, to be prepared for school, meet grade-level standards and graduate from high school prepared for employment or higher education.

IMPROVE FINANCIAL STABILITY FOR ALL PEOPLE TO ENJOY A QUALITY STANDARD OF LIVING.

Build access and share community tools that break down barriers to financial stability. Our neighbors have an opportunity and the tools for personal advancement; from crisis, to financial stability, to self-sufficiency.

IMPROVE THE HEALTH OF ALL INDIVIDUALS.

Create a healthier community by making it easier for partners to work together. Our neighbors will have access to health care, know how to lead healthy lives and be empowered to live and participate in environments that promote good health.

THE POWER OF PARTNERSHIPS | LIVE UNITED

GIVING CHANGES LIVES.

United, we are making real changes for real people in our community.

Our collaborative efforts are more than simply philanthropic – they are also strategic and data-driven.

We know that the more educated, financially stable and health individuals are, the more our entire community benefits.

Trident United Way's approach gives everyone involved the opportunity to unite and make real strides in creating lasting change, right here at home.

GIVE UNITED | LIVE UNITED



RUNNING YOUR CAMPAIGN

5 STEPS TO RUNNING A SUCCESSFUL CAMPAIGN



1. ENERGIZE



2. INSPIRE



3. ENGAGE



4. ASK



5. THANK



ENERGIZE



INVOLVE YOUR CEO

Your CEO can help champion the work and ensure a successful campaign.

With your CEO:

- Establish a campaign timeline and budget.
- Confirm your company's corporate gift.
- Start thinking about leadership donor strategy.
- Kick off the campaign with a company-wide email or short video from the CEO.



DEVELOP CAMPAIGN STRATEGY

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

- Consider prior year results, number of employees and current business climate.
- People like to see results! Showcase dollars raised in real time throughout the campaign.
- Set goals for your company campaign.



RECRUIT YOUR TEAM

Before your campaign kickoff, build a diverse team from all departments to help plan and track events.



INSPIRE



HOST A VIRTUAL CAMPAIGN KICKOFF

Typical employee meetings or rallies have been effective in reaching all employees and encouraging them to invest in Trident United Way in the past. We recognize that times have changed significantly, and so we encourage you to set up a virtual kickoff rally using the below bullets as a guide.

- Be sure to invite your Trident United Way Relationship Manager to attend.
- Distribute brochures and pledge cards discuss ePledge options as employees arrive.
- Ask a colleague who has benefited or knows someone who has benefited from a Trident United Way program to share their experiences.
- Ask your CEO to attend and publicly endorse the campaign.
- Show a Trident United Way video by sharing a link in email or on intranet that demonstrates how the organization improves lives.
- Keep the meeting lively, informative and fun.
- Make the ask!
- Follow up with employees who were not able to attend.



USE YOUR TOOLS

We have created several assets to communicate the value of Trident United Way's work, including:

- Videos
- Posters
- PowerPoint presentations – will be available in the near future
- Sample Email templates – in the process of being produced
- Brochures
- Find campaign items here: tuw.org/campaign-materials



ENGAGE

Ideas and Examples:



EDUCATE COLLEAGUES

As the ambassador for Trident United Way, you can help your colleagues understand the value of their gift. Check out the impact reports available on the Trident United Way Website and use the following tips to share our work:

- Consider updating employees on Trident United Way work throughout the year.
- Use your company's internal communication tools to spread the Trident United Way message.
- Encourage colleagues to follow us on Facebook, Twitter and LinkedIn to stay updated. Sign up for 6x per year newsletter at tuw.org/enewsletter
- Send volunteer opportunities to employees. tuw.org/volunteer
- Invite employees to participate in a Poverty Simulation.



LEADERSHIP GIVING

Identify executives and/or employees giving \$500 or more. There are several strategies to enhance their giving experience through Step-Up programs or donor network engagements:

- Hold a raffle to incentivize for those who increase their gifts by a set percentage or dollar-per-week amount.
- Ask retirees to make a Planned Gift.
- Set an average gift goal for your company and incorporate an incentive.
- Hold a special leadership solicitation/recognition event at the beginning of campaign.



INCENTIVIZE GIVING

There are several ways to energize your campaign and increase participation:

- Set participation rate as a company goal.
- Hold a raffle for everyone who donates via payroll deduction (prime parking spots, days off, gift cards, etc.).
- Hold competitions between stores, branches, locations, and/or departments based on participation rate.
- Offer a casual dress day to everyone who donates.
- Offer an opportunity to win Trident United Way swag.
- Host a wrap-up party and thank everyone who participated.



ASK



GIVE EVERYONE THE OPPORTUNITY TO GIVE

The number one reason people do not give is because they are not asked! Trident United Way believes that giving is a personal decision. Make sure that everyone has the opportunity to give by supplying meaningful information about how Trident United Way changes lives and how each contribution drives our mission forward.

Start at the top – ask company leadership to set the example by making their contributions early. Remember to include off-site and remote employees and highlight corporate support, especially if your company has a program in place that matches employee donations.

Making the ask:

- Personally
- At campaign events
- At staff meetings
- At leadership events
- Via email and social media
- Via company newsletter or intranet



WAYS TO GIVE

Trident United Way wants to make it easy to give.

- Interested in automating or a paperless campaign? Ask your Trident United Way Relationship Manager about ePledge, our complimentary electronic campaign software.
- Payroll deduction via a fillable pdf of Trident United Way pledge forms
- Cash/Check
- Credit Card/Bank draft
 - One Time/Monthly/Quarterly/Semi-Annual
- Direct Billing via Statement/Invoice
- Stock Donation
- Planned Giving



THANK



MONITOR YOUR CAMPAIGN AND REPORT RESULTS

It is important to follow up with employees and report results:

- Ensure that your campaign team had the opportunity to speak with all employees.
- Keep regular totals and give progress reports to your CEO, team, organization and your Trident United Way Relationship Manager.
- Publicize campaign results throughout the organization - during and after the campaign.
- Track contributions by asking all employees to return pledge cards to you (even if they do not make a gift) or access ePledge information.
- Make sure that pledge cards are filled out and signed and that the total amounts are accurate.
- Give completed report envelopes, including signed pledge forms and raffle tickets, to your Trident United Way Relationship Manager.



SAY THANK YOU!

It is just as important to officially close the campaign and thank people as it is to begin the campaign.

- Thank employees for their participation, time and support individually through a CEO recognition letter.
- Recognize your team and others who volunteered their time.
- Publicize your results via email, voicemail, intranet, newsletters, social media, etc.
- Celebrate your success.
- Host a company-wide Thank You event.
- Turnover/flip the Trident United Way posters that have thank you message and statistics about impact on the back.

VOLUNTEER

VOLUNTEER UNITED

When you volunteer through Trident United Way, you're joining a collective who are giving back so others can get ahead. Use your time and talent to create social change where you work or live. The highly-sought after positions enable people to engage with TUV in meaningful ways that support the mission.

Join our community of game changers!



Help us celebrate this milestone!

Be part of the largest single volunteering day in the Tri-County! Participate in the 20th annual Trident United Way Day of Caring: **November 20, 2020**



Engage with TUV for customized volunteer event coordination.

Trident United Way offers tailor-made volunteer opportunities to corporate partners. Choose the frequency that is right for your company - monthly, quarterly or semi-annually. Projects range from supply drives to home builds and can take place at your office or out in the community.



Encourage your employees to serve on Trident United Way committees and councils.

Service to the community through TUV committees and councils provides opportunities to gain leadership experience through volunteering and participation in various grant review cycles.

TRIDENT UNITED WAY – THE LEADER IN UNITING OUR COMMUNITY TO IMPROVE LIVES.

COMMUNITY CONNECTOR * STRATEGIC PARTNER * VOLUNTEER ENGAGER * GRANTOR

INVEST

TRIDENT UNITED WAY DONOR NETWORKS



Trident United Way Tocqueville Society

The **Trident United Way Tocqueville Society** is a worldwide network of extraordinary community leaders and philanthropists who invest \$10,000 or more annually through their local United Ways. At Trident United Way, our members demonstrate a deep commitment to making a tangible difference in the lives of children, young people and families in the Tri-County area.



Trident United Way Palmetto Society

The **Trident United Way Palmetto Society** recognizes donors who give \$1,000-\$9,999 annually to Trident United Way. Nearly 1,500 members strong, the Trident United Way Palmetto Society accounts for 25% of all Trident United Way giving in Berkeley, Charleston and Dorchester counties. Trident United Way Palmetto Society members set a standard of charitable giving in our community and motivates others to contribute at a leadership level to Trident United Way.



African American Leadership Council

African American Leadership Council is an energized group of passionate philanthropists. Join this group to have fun while making a difference through the annual book drive, lunch and learns, volunteer activities and celebrations.



Women United

Through **Women United**, local female leaders gather for volunteer projects and informative lunch and learns. Members look forward to the annual Women United luncheon each spring.



Young Leaders United

For philanthropists 40 and under, **Young Leaders United** is a must-join for networking and leadership opportunities. Sip & Serve, Cocktails + Conversation, volunteer events and lunch and learns are just a few ways to make a difference with this group.

TALKING POINTS

Helpful information for when talking to your employees about Trident United Way.

What We Do

Improve Systems – Trident United Way knows that the community is better when everyone works together. Trident United Way offers infrastructure and systems supports to grantees, community partners and faith-based organizations to increase impact and reduce duplication of services. CharityTracker, a web-based case management tracking tool, one example of these supports, is provided for free to partners in the community – 320 partner organizations to be exact! In 2019-2020, organizations using CharityTracker were able to assist 25,718 households (54,762 individuals) with more than \$1.3 Million in monetary assistance.

Build Capacity – Trident United Way provides value adds and builds capacity among grantees and community partners through collective impact, volunteer engagement, evaluation and data analysis, technology and tools and the AmeriCorps Program.

Grantees – For the 2019-2022 funding cycle, 19 agencies delivering 25 programs received program investment and basic needs grants through an open and competitive application process. Grantees are working to make measurable impact aligned to collective impact priorities in education, financial stability, health and basic needs. Grant recommendations and decisions are made by volunteer review panels comprised of community leaders & donors.

Education

Kindergarten Readiness – Trident United Way is taking the lead role as the catalyst for change in education as the Network Convener for the Tri-County Cradle to Career Collaborative Kindergarten Readiness Network. As the leader in this area, Trident United Way is galvanizing partners focused on resources and programs for children and families, ages birth to 8 years, along with other community partners, to build the infrastructure necessary to support hundreds of early learning organizations, providers, businesses, governments and community volunteers in helping children entering school ready to learn.

Early Literacy Initiative – In the Tri-County area, approximately 50 percent of students are not proficient in reading when assessed in third grade, and remarkably 50 percent of students attending high poverty schools are reading at least two grade levels behind. To support critical literacy milestones, Trident United Way completed a 3-year demonstration project in collaboration with all four local school districts to implement the Tri-County Reading by Third Project. This project is an evidence-based teacher professional development model. This partnership resulted in the most successful literacy project funded in Trident United Way history.

Financial Stability

The Financial Stability impact area focuses on Integrated Community Systems, which is capacity building tools, services and systems building to ensure Tri-County residents are supported along the financial stability framework. Trident United Way initiatives that operate along the framework and are part of the Integrated Community Systems include AmeriCorps, Trident United Way Resource Connection Centers, SC Thrive Hub online application tool, CharityTracker and the Emergency Food and Shelter (EFSP) program.

SC 211 Resource and Information Line – The 211 resource and information line is free and confidential phone line and provides information and referral to health and human service resources available in Berkeley, Charleston and Dorchester Counties. 12,407 calls from the Tri-County area were answered in the 2019-20 fiscal year. Callers interact with professionally-trained intervention specialists who can be supportive listeners. They offered 25,135 referrals to local community resources to callers. The most frequent call is people looking for help with utilities. If you or someone you know is looking for help, encourage them to dial 211, visit sc211.org or download the app on their smartphone.

AmeriCorps Program – Trident United Way manages 20 AmeriCorps members who provide financial stability services as Family Navigators in partner agencies and schools to help families gain access to resources that mitigate financial crisis and support stability. Members assisted nearly 14,500 families connect to 1,500 services in 2019-20 fiscal year.

Trident United Way Resource Connection Centers (formerly Prosperity Centers) – The Trident United Way Resource Connection Centers model combines the referral resources and expertise of established organizations partnering to accomplish common goals using the financial stability framework. Trident United Way leverages resources by supporting a system of comprehensive services under one roof in two locations in Berkeley and Dorchester Counties. The Resource Connection Offices serve all individuals 200% at or below the poverty line, including veteran and senior citizen populations. 1,778 people received a total of 4,716 financial stability services in the 2019-2020 fiscal year. These services include free tax filing assistance, access to benefits, basic needs and stabilization and budgeting training and classes. The Resource Connection Centers are designed to meet people where they are on their journey to financial stability.

TALKING POINTS

Health

In January 2017, Trident United Way, Roper St. Francis Healthcare and MUSC Health launched Healthy Tri-County (HTC), a multi-sector regional initiative to improve health outcomes in Berkeley, Charleston, and Dorchester counties. The aspirational goal of HTC is to improve the health and well-being of every person and community within the Tri-County area. 70 organizations are formal members (committing their organizational time, talent and treasure to HTC), and over 1,100 individuals are a part of the HTC network. HTC engages individuals and organizations from various sectors interested in improving health outcomes and is working on the development and implementation of *Healthy Tri-County: Our Health, Our Future*, a five-year regional health improvement plan which will provide concrete recommendations and action steps for improving health outcomes. Priorities include Access to Care, Clinical Preventive Services, Maternal, Infant and Child Health, Mental and Behavioral Health and Obesity, Nutrition and Physical Activity.



Trident United Way
6296 Rivers Avenue
North Charleston, SC 29406
(843) 740-9000 | Tax ID#: 57-0314378
Dial **2-1-1** Helpline for Assistance - Help Starts Here

