

2011

**EMPLOYEE CAMPAIGN COORDINATOR
TRAINING GUIDE**



Together, united, we can inspire hope and create opportunities for a better tomorrow.

That's what it means to

LIVE UNITED



**United Way of the
Mid-Willamette Valley**

**Serving Marion, Polk and
Yamhill counties**

Table of Contents

Your Role as Employee Campaign Coordinator	3
Campaign Theme and Message	4-5
Running a Successful Campaign	6-7
Leadership Giving	8
Campaign Goal Setting Worksheet	9
Company Campaign Data Worksheet.....	10
Sample CEO Endorsements	11
Sample Meeting Agenda and Checklist	12
Sample (Fun)raising Ideas and Employee Incentives	13
Tips to Make the Ask Easier	14
Concerns and Objections.....	15
Human Resources and Accounting/Roles and Responsibilities.....	16
Frequently Asked Questions	17-19
Integrating Volunteerism into Your Campaign/HandsOn MWV.....	20

Your Role as Employee Campaign Coordinator

Congratulations and thank you for joining the United Way of the Mid-Willamette Valley as an Employee Campaign Coordinator. You are instrumental to the success of your company's campaign, the United Way and thousands of people impacted through the programs we support.

You are probably wondering, "What do I do next?" Don't worry. Your United Way staff and Loaned Executive, along with this guide, will provide you with the steps for running a successful campaign.

Thank you, again for your commitment, enthusiasm and support. We are honored to partner with you and your colleagues to make a difference in our community.



Reaching out to create lasting change

Contact us at:



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Mid-Willamette Valley

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CAMPAIGN THEME AND MESSAGE

LIVE UNITED is the theme of this year's United Way campaign.

LIVE UNITED™

Advancing the Common Good

The United Way is working hard to advance the common good by focusing on education, income and health. These are the building blocks for a good life: a quality education that leads to a stable job, enough income to support a family through retirement, and good health.

EDUCATION

Helping children and families achieve their potential through education

INCOME

Helping families become financially stable and independent

HEALTH

Improving people's health

The United Way's goal is to create long-lasting changes by addressing the underlying causes of community problems. Living united means being a part of the change.

It takes everyone in the community working together to create a brighter future. So we bring together people from all across the community—government, business, faith groups, nonprofits, the labor movement, ordinary citizens—to tackle the issues.

Because we all win when a child succeeds in school, when a family becomes financially stable, and when people have good health.

CAMPAIGN THEME AND MESSAGE

Living united means being a part of the change.

There are three ways that you can **LIVE UNITED** in your community:

GIVE: The workplace campaign is the easiest and most powerful way to invest in your community.

ADVOCATE: You can make change happen with your voice. Get informed. Tell your friends. Write a letter to the editor. The United Way needs people who are passionate about creating a brighter future in our community to make some noise.

VOLUNTEER: The United Way works with volunteers and local nonprofits to develop the best opportunities for youth, busy working adults, and seniors.

Live United Elevator Speech

As the ECC, you may be asked to say a few words about the United Way during your campaign kickoff or group meetings. The elevator speech brings together all of the important ideas about the United Way's impact in the community.

The United Way is working to advance the common good by focusing on education, income and health. These are the building blocks for a good life— a quality education that leads to a stable job, enough income to support a family through retirement, and good health.

Our goal is to create long-lasting changes that prevent problems from happening in the first place. This is why we support programs that provide early learning opportunities, improve financial education, and increase health education and preventive care.

We invite you to be part of the change.

Together, United, we can inspire hope and create opportunities for a better tomorrow.
That's what it means to **LIVE UNITED**.

Running a Successful Campaign

Get Connected – Attend a Training Session

Your local United Way team is here to help. We encourage you to take advantage of our training sessions and work closely with your Loaned Executives to ensure your campaign's success.

- Sign-up for a United Way of the Mid-Willamette Valley Employee Campaign Coordinator (ECC) training session
- Meet your United Way staff representative and/or Loaned Executive
- Review the United Way materials and learn about the United Way's impact in your community
- Share and exchange ideas with other campaign coordinators

Know Your Organization's Giving History

Now that you have taken on the role of ECC, it's important to understand your company's past campaign results. Knowing past giving history will help you identify your campaign's strengths and opportunities to set achievable goals. A past giving history and goal setting worksheets are provided at the end of this guide.

- Total employee pledges
- Percent of participation and average employee gift
- Total corporate dollars contributed (if applicable)
- Number of Leadership Givers (\$1,000+)
- Special Events held and amount raised

Obtain Support

Your organization supports the United Way and engages annually in a workplace campaign. Gaining direct support from respected management team members can help insure your campaign's success.

- Ask your CEO for personal campaign endorsement (see attached sample letter)
- Work with your CEO to set budget for campaign events
- Have CEO introduce your campaign team at kick-off event
- Ask your CEO for a corporate gift/match
- Have your CEO thank employees and campaign team at wrap-up event

Build a Team

Running your campaign takes a team, and besides it's more fun with friends. Building a strong, diverse campaign committee will help you implement your plan and make a bigger impact in our community.

- Consider recruiting committee members from all departments, professional staff, management, organized labor, support staff and even retirees, who have high-energy and are well respected in your organization
- If you are a new ECC, ask the past campaign coordinator to be on your team
- Recruit a committed Leadership Giver from your management team to spearhead your Leadership Giving strategy
- Talk with your team about strategies and events that build awareness and enthusiasm
- Ask your Loaned Executive to be on your team and provide resources for the committee

Set Goals and Develop a Campaign Plan

Working with your committee to develop a plan that is tailored to your employees and work culture will help you meet your campaign goals.

- Set clear campaign goals based on your organization's past giving history (use worksheets provided at end of this guide)
- Identify potential Leadership Givers within your organization and create a Leadership Giving component for your campaign
- Strive for 100% education – ensure every employee has the opportunity to learn how the United Way is impacting people and issues in our community
- Determine types of events to have and remember that large events generate excitement.
- Participate in a United Way's annual Days of Caring. Information is included in your ECC training packet. See page 19 for information on integrating volunteerism into your campaign.
- Invite a United Way speaker and/or attend an site tour of a United Way partner organization to learn firsthand how your investment in the Community Impact Fund is making a difference in our community

Promote and Publicize Your Campaign

- Host a Kick-Off Event and show the United Way video
- Make the ask. One of the most common reasons people don't give is because they were not asked. Provide brief, lively and educational opportunities that allow everyone to make a personal, informed decision on supporting the United Way
- Place United Way posters and table tents in break rooms and meeting spaces
- Create signs tailored to your campaign's special activities
- Promote your campaign through employee newsletter, e-mail, voice mail, bulletin boards and outdoor reader boards
- Use special events to generate interest and add fun to your employee campaign

Campaign Wrap-Up, Reporting and Appreciation

Wrapping up your campaign is easy and insures accurate accounting of your campaign's success.

- Follow-up with all employees to collect completed pledge forms. Make sure employee retains pink copy and yellow copy is forward to HR for payroll deduction pledges
- Please note, the pink copy, along with the employee's payroll stub serves as official tax documentation for charitable giving
- Complete Campaign Report Envelope and put all white copies in envelope
- Seal report envelope with sticker and sign. Call your LE or United Way representative to arrange pick-up/delivery of completed report envelope and campaign materials.
- Thank everyone. Thank your campaign team, your employees, your CEO, thank yourself and everyone else who contributed to your campaign's success
- Host a wrap-up celebration and announce campaign results to employees

Leadership Giving Opportunities

Pacesetter

The United Way recognizes individuals whose philanthropic investment set the pace to leadership giving. Individual or family gifts of \$500-\$999 are recognized as Pacesetter Givers on the path to the Leadership Circle.

Leadership Circle

The United Way's Leadership Society recognizes donors who contribute \$1,000 or more annually to the campaign. Leadership Givers set the standard for charitable giving, and motivate, by example, those who have the potential to increase their level of commitment. Any employee is a potential Leadership Giver—all it takes is a donation of a little over \$19 a week to contribute at a Leadership Giving level. A senior level manager of a Leadership Giving Committee typically champions successful leadership campaigns.

- Leadership Givers – Individual or family gifts of \$1,000 or more
- Tocqueville Society – Individual or family gifts of \$10,000 or more

How to conduct a leadership giving campaign

Ask your CEO to serve as the leadership giving chair. Ideally, he or she should participate at that level of giving.

Set a goal for Leadership Giving.

Work with the payroll department to develop a prospect list for your leadership giving campaign by salary range, management level or donors who may already be close to that level of giving or were giving at Leadership Levels last year.

Ask the CEO to host a breakfast or other meeting to kick off your leadership giving campaign prior to your employee campaign.

Send personal invitations from your CEO to the potential leadership givers. Create an agenda that follows the sample meeting agenda on page 12. Be sure to include the following:

- CEO explains leadership giving (\$1000 and above) and its benefits
- CEO gives personal endorsement of program
- CEO asks employees to consider giving at a leadership level
- Couples may combine their gifts for recognition (Be sure to notify the United Way in those cases)
- Follow up with those who were unable to attend
- Report all leadership results with appropriate documentation to the United Way
- Report the results of the leadership giving campaign to all employees
- CEO hosts a thank you/recognition event

Campaign Goal Setting Worksheet

Based on last year's Campaign, determine the following:

- _____ Number of employees
- _____ Average gift
- _____ % Employee participation
- _____ Fundraisers and special events
- _____ Number of Leadership Givers
- _____ % total gift increase over prior year

Using the above data, ask yourself these questions:

If we **increase the average gift** to \$_____ while keeping the % participation the same, we would raise \$_____ dollars.

If we **increase the number of donors** to _____ while keeping the average gift the same, we would raise \$_____ dollars.

If we **increase the average gift** to \$_____ and increase the number of donors to _____, we would raise \$_____ dollars.

This Year's Campaign Goal(s):

- _____ Number of employees
- _____ Average gift
- _____ % Employee participation
- _____ Fundraisers and special events
- _____ Number of Leadership Givers

If goals achieved, what is

_____ % of total gift increase over prior year



Company Campaign Information and Data Update

Information	
Company	
Contact	
Contact Title	
Contact Phone	
Contact Email	
Employee Campaign Coordinator	
ECC Phone	
ECC Email	
Company Address	
Local Company President/CEO	

Data												
Year	# of Employees	# of Givers	% Participation	Avg Employee Gift	# of Leadership Gifts	Avg Leadership Gift	Total Leadership Gift Amount	Employee Pledges	Fundraisers or Special Events	Total Employee Pledges	Total Corporate Pledge	Total Pledge

* A Leadership Gift is \$1,000 or more

Sample CEO Endorsement Letters (Can be edited to use as ECC letters)

Dear (Employee):

(Company name) has always been proud to support our employees, as well as our larger community. One way that we do this is through our participation in the annual United Way campaign. We'll be holding a kickoff that you won't want to miss! Mark your calendar now for (month/day/time/place).

Join us to learn how your contribution to the United Way of the Mid-Willamette Valley will make an impact in our community. Our local United Way is committed to investing people's time and money in results that matter – in programs and initiatives that address these core needs, and that have lasting and measurable results on community conditions. We do this by building partnerships, forging consensus, and leveraging resources to make a difference in Marion, Polk and Yamhill counties.

Soon you will be asked by a fellow employee to make your contribution to this year's campaign. Please take a moment to think about what really matters – and make one simple gift that can help change a life, and our community, in so many ways.

Please join us as we work together to improve people's lives and create lasting changes throughout our community.

Sincerely,
(CEO)

Dear (Employee):

During the next few weeks, you will be hearing a great deal about the United Way. Our organization recognizes the important and ongoing work of our local United Way, and the services provided to our neighbors through its special initiatives and agency partners.

The United Way of Mid-Willamette Valley works collaboratively to assess and review the priority needs of our community. Volunteers from all walks of life spend time carefully evaluating partner agencies and programs to decide how our contributions can be best invested to ensure the greatest outcomes.

Every year, we get the chance to demonstrate our community spirit and leadership by taking part in the United Way campaign. Please join me in supporting this year's effort by contributing as generously as you are able.

Our company's campaign kicks off on (date). This year, we invite you to consider either joining us or increasing last year's contribution. Because of you, our communities will be stronger for generations to follow.

Sincerely,
(CEO)

Sample 20 minute Group Solicitation Agenda

Welcome	ECC or Committee Member (2 min.)
Welcome & Campaign Endorsement	CEO/Senior Executive (2 min.)
United Way Overview, Community Needs	LE/United Way Representative (4 min.)
Campaign Video	(6 min.)
The Pledge Ask, Pledge Form (encourage payroll deduction, promote incentives)	(3 min.)
Closing Remarks	Campaign Coordinator, United Way Representative (2 min.)

Meeting Checklist

- Thank the Speaker
- Announce Campaign Dates
- Offer Incentives
- Provide General Instructions - completing pledge forms/payroll deduction
- Make The Ask - have employees complete and turn in pledge forms before leaving
- Answer Questions
- Thank Employees for their support!

Sample Fun(raising) Ideas

Bake Sale
Bingo night
Book Sale
Casual Day
“Change” for a Change Jar (for staff or for customers)
Karaoke Party
Pumpkin Carving Contest
White Elephant Sale
Raffles
Pancake Breakfast
Parking Space Auction/Raffle
Costume Contest
Pizza Party
Golf Tournament
Chili Tasting/Cook-off
Office Decorating Contest
Be creative...add your own ideas!

Sample Employee Incentives

Time Off From Work
Casual Day / Jeans Day
Reserved/Covered Parking
Tickets to Games/Movies
Grocery Certificates
Company T-Shirts
Dinner for Two
Hotel Getaways
Gift Certificates
“Sleep-In”/“Leave Work Early” Passes
Extra Half Hour for Lunch for a Week
Movie passes
Be creative...and add your own ideas!

Quick Tips to Make the Ask Easier

Make your pledge first

When your co-workers ask if you support the United Way, what will you say? If they know that you believe in and support the work of the United Way, they'll be more likely to make a pledge too.

Know the facts

Read the background materials carefully. The more you know about the United Way, the easier your job will be.

Make personal contact

People give to people and most studies show that people give because they were asked. Set up a face-to-face meeting to ask for a pledge. It's best not to just leave pledge forms on desks.

Be positive

Explain the benefits of giving to the United Way. Stress the importance of each person's contribution to our community. Emphasize that funds invested in our community, stay in our community.

Ask co-workers you know first

Approaching people you know will help you be more relaxed and comfortable as you refine your presentation skills. The positive responses you receive will boost your confidence.

Be prepared for questions and concerns

People deserve to know that their money is being invested wisely. If you don't know the answer to a question, contact your United Way staff and get back to your colleague as soon as possible.

Retrieve all pledge forms and say Thank You!

You should collect a pledge form from every employee—whether or not the individual contributes—as a record that each has made a conscious decision. Remember to thank everyone.

Concerns and Objections

You may, on occasion, encounter people who object to contributing to the United Way. Please keep in mind that objections are a natural part of the campaign and offer you an opportunity to present more information.

Here are some suggestions for handling them:

Objections are not personal

Remember, they are not directed at you. Generally, a very small percentage of the population will not give to any charity. But that means most people think it is important to give back to the community in some way.

Objections are often based on incorrect information

You must try to identify the real issue. Objections based on incorrect information often provide an opportunity to educate.

Show sympathy

Listen carefully and show your concern. This does not mean you agree, but that you care about the concern.

Don't argue

Instead, offer information about the many ways the United Way helps people, or offer to discuss the issue further after the group meeting.

Encourage the objector to talk

Allow the person voicing the objection the opportunity to expand on it if possible. An insecure, illogical or poorly thought-out objection will fail on its own.

Relax and be yourself

You have the ideas to present, so be straightforward in your presentation. Asking for someone's participation or gift is not a "win/lose" situation.

Don't be afraid to say you don't know

Let those with questions know you'll get back to them with the answer, tell them they can call their Loaned Executive or the United Way of the Mid-Willamette Valley or ask them to visit our web site at www.unitedwaymwv.org

Human Resources and Accounting

Payroll Roles and Responsibilities

HR and Accounting are essential partners in the United Way's annual fund drive. With support from both areas, your campaign will have a seamless flow from launch and donation collections through to donation delivery and donor recognition. This area of the manual is for your use to review these procedures with these departments so that your campaign is a complete success.

Related Terminology

Pledge Loss – Occurs when a donor completes a pledge form detailing their promise of a donation to the United Way and then for whatever reason that promise goes unfulfilled. Many times the employee transitioned away from the employer due to retirement, new job, or let go.

Fundraiser – All campaign related activities that employees pay to participate in, for example cook offs, auctions, raffles, and casual day. The United Way doesn't track individual donor information for these events.

Payroll Deduction – Any gift giving to the United Way through a paycheck withdrawal. It is imperative that the United Way receives donor information so that we can track payments and acknowledge donors for gifts. If donor wishes to remain anonymous acknowledgements will not be sent.

One Time Gift – Any one time gift giving to the United Way. This can be through payroll deduction, cash, check, or credit card processing. It is imperative that the United Way receives donor information so that we can track payments and acknowledge donors for gifts. If donor wishes to remain anonymous acknowledgements will not be sent.

Corporate Gift – This is any corporate gift regardless of employee participation.

Corporate Match – This is corporate gift contingent on employee participation.

Best Practice Procedures

Pledge Loss – To avoid pledge loss if an employee is transitioning out of your employment use the attached form allowing an opportunity to fulfill their promise. The easiest way for the donor to do so is for the remaining balance of their pledge to be withheld from their final paycheck. (Donor Choice Form attached)

Payment to the United Way – To remain consistent and timely with donor investments United Way recommends either a monthly payment or quarterly payment schedule. All donor dollars would be sent to the United Way on one check made payable to the United Way of the Mid Willamette Valley or UWMWV. Within the remarks section on the check stub, please note the dollar amount for each category: Fundraiser, Payroll Deduction, One Time Gift, Corporate Gift, and Corporate Match. After the first payment, some categories should/could be paid in full (Fundraisers, One Time Gifts and Corporate Gift/Match).

Frequently Asked Questions

Q. What are the advantages of giving through the United Way?

A. It makes a real impact – the United Way combines your gift with thousands of others and then focuses these donations to have a measurable impact on key issues that matter in our community like:

- Education-Helping children, youth and adults achieve their full potential.
- Income-Promoting financial stability and independence
- Health-Improving people's health

A. It's local - Funds raised in the Marion, Polk and Yamhill area stay right here to address local problems. It's accountable - Local stakeholders decide which programs receive funds and ensure that funded programs have measurable outcomes. It's efficient - Volunteers help conduct the campaign, which help keep costs low. It's easy - Payroll deduction makes giving simple and easy.

Q. I can only afford to give a small amount. Is it worth giving at all?

A. Yes, every donation is important. Giving in proportion to your ability gives a sense of belonging to a larger community, and of making a difference. And payroll deduction makes it easy to give a little each pay period resulting in a substantial annual gift! Additionally, the United Way combines your gift to Community Impact Fund with thousands of others and then focuses these donations to have a measurable impact on key issues that matter in our community

Q. When I contribute money to the United Way, how are my dollars used?

A. When you contribute to the United Way of the Mid-Willamette Valley, you invest in the future of our community. You are helping more than just one person or charity—you are changing community conditions that create lasting results.

Your dollars support a wide variety of programs and initiatives in our community. These programs address hunger, homelessness, violence and abuse, strengthening families, youth development, after school programs, mental health services, programs for health and rehabilitation and more.

Q. How do I know the United Way of Mid-Willamette Valley is focusing on the right issues?

A. Local community leaders and volunteers-your friends and neighbors-help ensure that the United Way of the Mid-Willamette Valley is focusing on the most pressing needs in our community. Volunteers examine community needs, review agency grants, visit agencies and review their programs, and deliberate to ensure that donor contributions our meeting critical needs. This is how the United Way makes sure the right issues are being addressed.

Q. My spouse gives ... Why should I?

A. When families are fortunate enough to have two incomes, each may contribute at their own place of employment.

Q. I already volunteer my time. Why should I give?

A. Those who volunteer are more likely to give. They see the needs firsthand. Many of the agencies could not exist if it were not for the hundreds of volunteer hours "given" each year. Keep

in mind, however, that basic overhead (water, electricity, space, staff) cannot be paid with “in-kind” contributions. That is why monetary contributions are vital to the survival of community services.

Q. I haven't ever used United Way services. Why should I give?

A. The United Way-funded services help everyone. It is a popular misconception that only the jobless and truly “at risk” seek help from the United Way partner organizations. Everyday people have problems and needs too - marital problems, child care needs, alcohol and drug abuse problems, troubled teens and aging parents - and the United Way services are available to all. Your United Way contribution helps your co-workers, your friends, your neighbors, and your family.

Q. There are a lot of agencies out there. Why should I give to the Community Impact Fund?

A. The United Way volunteers provide accountability for donations to the Community Impact Fund. Simply put, the Community Impact Fund takes the guesswork out of giving and makes sure your dollars will be directed to local agency programs and community initiatives that address key community problems, such as nurturing children and youth, increasing people's economic self-sufficiency, promoting health, wellness and safety, as well as meeting people's basic needs.

Trained, knowledgeable volunteers - people who live and work in our community - invest your gift through United Way agencies. When you choose the Community Impact Fund, you are helping to make our community stronger and safer.

Q. Are donations to the United Way tax deductible?

A. Yes, United Way of the Mid-Willamette Valley is a tax-exempt, charitable organization recognized under section 501(c)3 of the Internal Revenue Code, and all donations are deductible. Your payroll stubs, along with your payroll deduction form serve as your tax-deduction receipt.

Q. What is the United Way of the Mid-Willamette Valley's affiliation with United Way of America?

A. The United Way of the Mid-Willamette Valley is a separate and autonomous organization from the United Way Worldwide. UJMWV is a local organization, serving Marion, Polk and Yamhill counties. Like the nearly 1,400 community-based United Ways across the country, our United Way is separately incorporated and independently governed by a local volunteer Board of Directors so that the most critical issues in our communities can be addressed.

Q. What are the United Way's operating costs?

A. The United Way of the Mid-Willamette Valley takes pride in operating with efficiency and effectiveness. The Better Business Bureau (BBB) recommends that non-program service expenses not exceed 35% of total expenses. We are proud to say that our current support service expenses are 16%, which:

- Serves our three-county service area of Marion, Polk and Yamhill
- Supports more than 300 companies, helping them run employee giving campaigns
- Builds awareness of community needs and issues, as well as the programs and partnerships working to improve lives and impact change
- Encourages participants to get involved in our community through giving, volunteerism and mentorship.

Q. When is my donation distributed?

A. Your donation is made in for the form of a pledge, or promise, to donate over the course of a year through your payroll deduction process. Your donation will then be distributed in the grant cycle immediately following the campaign in which it was pledged.

Q. Does the United Way of Mid-Willamette Valley offer major gift and planned giving programs?

A. For those with the ability and desire to give more, the United Way offers the Leadership Giving for donations of \$1,000 to \$9,999 annually, and The Alexis de Tocqueville Society for annual gifts of \$10,000 or more.

For planned giving, United Way's Endowment Fund sustains your caring beyond your lifetime.

Integrating Volunteerism into Your Workplace

HandsOn Mid-Willamette Valley – A Volunteer Action Center

Running a United Way campaign provides employees an opportunity to give financially towards meeting our community's most pressing needs. Workplace campaigns are also an opportunity to educate and mobilize your employees for year around advocacy and volunteerism. Workplace volunteerism not only supports the community, but is also provides workplace benefits including increased employee morale and productivity, opportunities for team building, heightened community awareness and community recognition. With the support of the United Way's volunteer action center, HandsOn Mid-Willamette Valley, integrating volunteer and awareness building activities into your workplace campaign has never been easier. Here are just a few of the opportunities available:

Team Building

- Host a company-wide day of service and plug employees into service projects introducing them to United Way partner agencies and impact areas.
- Challenge departments to an inner-office service challenge to see which department can complete the most volunteer hours during a period of time.
- Plan a number of family-friendly volunteer projects and encourage employees to bring their families for an opportunity to explore our community's social issues while getting to know fellow employees and their families.

Individual Volunteering

- Distribute a handout to all employees highlighting agencies and volunteer opportunities in the neighborhood around your company.
- Begin highlighting new volunteer opportunities on a regular basis in a monthly employee newsletter, on a lunch room memo board, or distribute HandsOn's monthly *Volunteer Action Alert* to all employees.
- Launch an employee volunteer program as part of your workplace campaign that allows all employees to volunteer a certain number of hours per month.

Workplace Engagement

- For employees who can't give financially or for those who want to give more hold a workplace food or book drive to benefit local agencies.
- Integrate on-site service projects such as making cat toys for the Humane Society, stuffing packets for a nonprofit, or writing letters to a child with a terminal illness into staff meetings, lunch rooms, or campaign presentations.
- Highlight employees who are volunteering and the agencies they choose to support in public forums around your company encouraging other employees to volunteer.

HandsOn Mid-Willamette Valley is dedicated to supporting local businesses in planning volunteer projects and in providing information about local volunteer opportunities. To explore these or any other opportunities for integrating volunteerism into your United Way workplace campaign, please contact Khela Singer at khela@handsonmwv.org or (877) 372-4141.