



2016-2017 WORKPLACE AMBASSADOR HANDBOOK

YOUR GUIDE TO A
GREAT WORKPLACE
GIVING CAMPAIGN





Dear Friend,

First and foremost, I want to thank you.

Thank you, not only on behalf of our organization, but the whole community. The work you're doing with these campaigns will truly help create pathways out of poverty in Los Angeles County for our most vulnerable neighbors, including veterans, students, and the homeless.

As Workplace Ambassadors, you are our greatest champions in creating lasting change for our community. Because of you, we are securing permanent housing for our homeless neighbors, empowering students with the quality education they deserve, and sustaining programs that are helping veterans find employment. Please do not underestimate the profound impact your company will make on the lives of thousands.

You are making a difference.

I hope you will find this training book helpful in guiding you, step by step, through a great campaign with tools, tips, and best practices to ensure your success.

Remember, you're not alone. Your United Way staff is here to help you, whether it's keeping you informed about our results, helping you get materials, or answering your questions. We are committed to being your greatest advocates because, quite simply, **we couldn't do this important work without you.**

On behalf of the many people whose lives are forever changed by your dedication, thank you. United, we are ending poverty in Los Angeles County.

Sincerely,

A handwritten signature in black ink that reads "Charlotte Nguyen".

Charlotte Nguyen

Workplace Ambassador Trainer

213-808-6249

cnguyen@unitedwayla.org

P.S. If have any questions about your campaign, please do not hesitate to contact me directly at the information provided above.

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SECTION ONE:
ABOUT US

WHAT IS UNITED WAY OF GREATER LOS ANGELES?

United Way of Greater Los Angeles creates long-term solutions focused on **EDUCATION**, **HOUSING** and **FINANCIAL STABILITY** – the keys to a brighter future. From providing vital services that immediately help those in need, to designing long-term solutions to our most pressing problems, United Way is creating pathways out of poverty.

Like you, we believe in a world where everyone has access to a quality education, stable housing, and a steady job.



Before we get started...

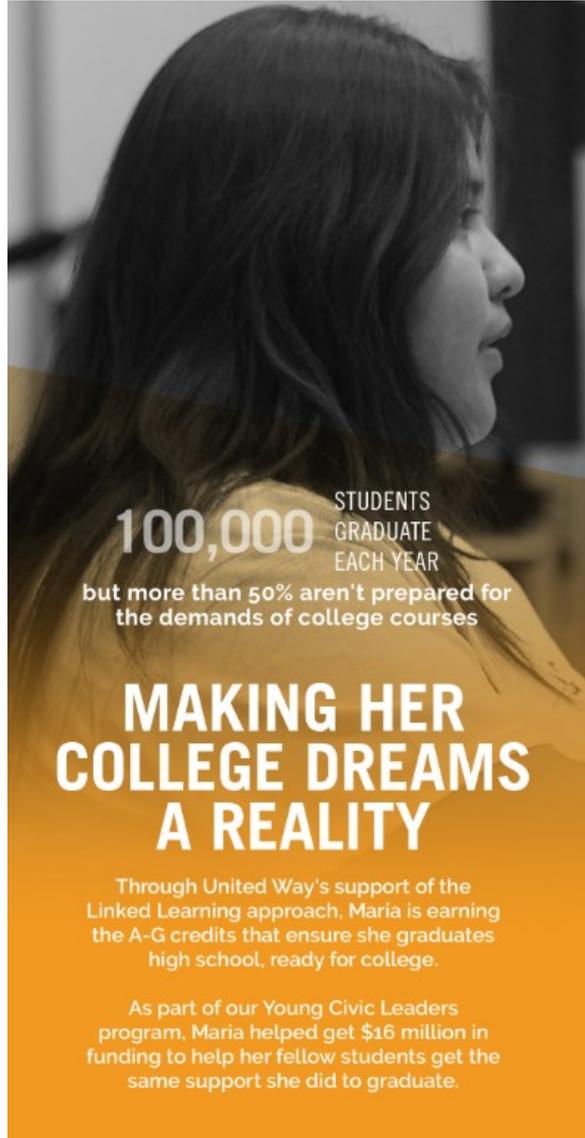
What calls you to take leadership in your community?

What is your "why"?

CREATING PATHWAYS OUT OF POVERTY

With your help, United Way of Greater Los Angeles is creating pathways out of poverty in our community by investing in three action areas—education, housing, and financial stability.

EDUCATION



100,000 STUDENTS GRADUATE EACH YEAR
but more than 50% aren't prepared for the demands of college courses

MAKING HER COLLEGE DREAMS A REALITY

Through United Way's support of the Linked Learning approach, Maria is earning the A-G credits that ensure she graduates high school, ready for college.

As part of our Young Civic Leaders program, Maria helped get \$16 million in funding to help her fellow students get the same support she did to graduate.

Without access to a quality education, kids born into poverty are likely to remain there for their entire lives. We're making sure kids are getting access to a quality education, and are graduating prepared for college and careers. With your help...

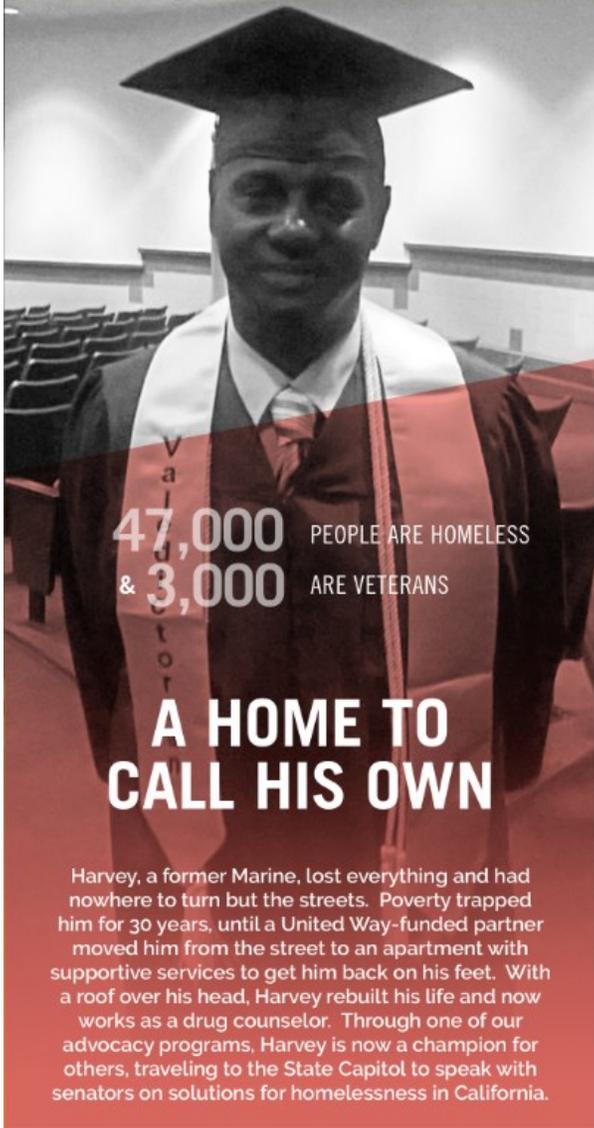
57,000 students have received internships and real-life work experiences since 2014.

51% of kids are now graduating meeting the requirements for the UC system, compared to just 34% in 2010.

79% of kids are graduating from high school in Los Angeles County.

CREATING PATHWAYS OUT OF POVERTY

HOUSING 



47,000 PEOPLE ARE HOMELESS
& **3,000** ARE VETERANS

A HOME TO CALL HIS OWN

Harvey, a former Marine, lost everything and had nowhere to turn but the streets. Poverty trapped him for 30 years, until a United Way-funded partner moved him from the street to an apartment with supportive services to get him back on his feet. With a roof over his head, Harvey rebuilt his life and now works as a drug counselor. Through one of our advocacy programs, Harvey is now a champion for others, traveling to the State Capitol to speak with senators on solutions for homelessness in California.

We believe that no man, woman or child should have to sleep on the streets. We are working to move our most vulnerable neighbors off the streets into safe, permanent housing with supportive services that puts them back on a path to stability and a better life. With your help...

30,000 people were moved from the streets and into permanent homes since 2011.

\$6.5 million were raised by **75,000** walkers at United Way's annual HomeWalk 5K, housing **17,000** formerly homeless people.

CREATING PATHWAYS OUT OF POVERTY

FINANCIAL STABILITY



In Los Angeles County,
1.9 million
INDIVIDUALS LIVE BELOW
THE POVERTY LINE

SAVING FOR HER FAMILY'S FUTURE

Karina is a single mother of three. While trying to make ends meet as a full-time receptionist at a dental office, Karina was introduced to a savings program and free tax preparation services through United Way. Karina created a separate savings account for each child to save money for their college expenses. She avoided borrowing money, and her oldest daughter will be graduating college this year!

Without financial stability, everyday life - paying the bills and handling emergencies - is challenging for families and people in Los Angeles County, which is one of the most expensive cities to live in. Because of you...

4,000 post-9/11 veterans were placed into jobs since 2012.

57% decrease in veteran homelessness in the last five years.

Over **7,200** low-income families improved their financial habits by increasing credit scores and savings, decreasing debt, and using budgets.

WHAT IS A WORKPLACE CAMPAIGN?

A workplace campaign is an organized, company-sponsored fundraising drive where employees are asked to contribute to United Way of Greater Los Angeles. Workplace campaigns have many benefits for your organization, its employees, and our community:

They make it easy for employees to give—through payroll deduction, a gift can be made over the course of a year

They maximize the impact of giving—one gift supports multiple Pathways Out of Poverty programs

They educate employees and organizations about community issues—connecting them with their community and allowing them to make informed decisions

They ensure that community charities get the support they need—someone you know has probably been helped by United Way

Giving Options

United Way offers a number of giving options that allow donors to support the community and the issues they care about.

Creating Pathways Out of Poverty

The Creating Pathways Out of Poverty Fund addresses the critical issues facing our community by investing in three action areas—education, housing, and financial stability.

Power Tip!

By giving to Creating Pathways Out of Poverty, donors impact a variety of our community's most pressing needs with a single gift.

Designated Giving (optional)

Donors can also choose to designate all or part of their contribution to one or more specific nonprofit agencies. This may be a United Way-funded Pathways Out of Poverty agency or any other qualified 501(c)(3) nonprofit organization.

YOUR ROLE AS A WORKPLACE AMBASSADOR

A Workplace Ambassador leads the planning, implementation, and evaluation of their company's United Way campaign.

Because you will be asking others to give, it is important that you understand United Way, believe in its mission, and support it with your own contribution.

As the Workplace Ambassador, you will be asked to:

⇒ Work closely with your United Way representative in creating a campaign strategy that includes:

- Visible support from top management
- Goals to increase giving
- Leadership giving
- Educating employees about United Way
- Giving everyone a chance to give

⇒ Assemble a campaign committee that represents all levels of your organization

⇒ Prepare and submit pledge forms and campaign reports

⇒ Evaluate your campaign and make recommendations for next year

⇒ Have fun while supporting the community where you live and work



SECTION 1: ABOUT US

LEARN, REFLECT, AND SHARE

WHAT TACTIC DID YOU LEARN ABOUT THAT YOU ARE EXCITED TO TRY OUT?

TO WHOM CAN YOU TURN TO FOR FOLLOW-UP AND ADDITIONAL RESOURCES?

IDENTIFY ONE IDEA OR ACTION TO IMPLEMENT IN THE NEXT 30 DAYS.

MAP OUT YOUR TIMELINE TO ENSURE YOUR SUCCESS!



SPACE OF INFINITE POSSIBILITY

BRAINSTORM | DRAW | IMAGINE

**SECTION TWO:
10 TIPS
FOR CAMPAIGN
SUCCESS**

10 TIPS FOR CAMPAIGN SUCCESS

Our experience tells us that the most effective and rewarding campaigns follow the 10 best practices outlined below. Each step is reviewed in greater detail later in this section.

#1 Get Familiar With Your United Way Campaign

- Attend a Workplace Ambassador Training and read this guide.
- Complete the Account Management Summary (AMS) Form.

#2 Secure Campaign Support From The Top

- Ask CEO to actively support the campaign.
- Support United Way through a corporate gift.
- Develop a budget for events and incentives.

#3 Build a Strong Campaign Team

- Recruit a campaign committee that includes representatives from all levels of your organization.
- Train and educate your team about United Way.

#4 Develop a Campaign Plan

- Review your campaign history to identify growth strategies and solicitation techniques.
- Set your campaign goal, timeline, and theme.
- Assign responsibilities to team members.

#5 Promote and Prepare

- Publicize your campaign through your company newsletters, with posters, etc.
- Organize a volunteer project or agency tour.
- Prepare pledge forms and other materials for distribution.

#6 Kick Off Your Campaign

- Start your Leadership campaign one week before the general campaign.
- Make your pledge to the campaign.
- Hold a general kick off event that communicates:
 - Management support
 - Campaign goals and activities
 - How to make a gift
 - When the campaign ends
- Invite a representative from United Way to speak.

#7 Make the “Ask”

- Distribute pledge forms and brochures to all staff.
- Make sure everyone is asked for a gift through group rallies and/or one-on-one solicitations.
- Explain how gifts to United Way's Creating Pathways Out of Poverty programs make a difference.
- Explain the benefits of Leadership giving.

#8 Monitor Your Progress

- Keep a running total as pledges are collected.
- Hold a mid-campaign review to see if your campaign is on track for goal.
- Follow-up with those who have not yet pledged.

#9 Report Results

- Transmit all pledge forms to United Way within two weeks of closing your campaign.
- Share your campaign results with employees and thank them for their support.
- Have your team evaluate the campaign.

#10 Stay Involved Year-Round

- Participate in United Way events held throughout the year.
- Put United Way updates in your organization's newsletters.
- Visit www.unitedwayla.org for more ways to get involved.

1 Get Familiar with your United Way Campaign

Your first step is to familiarize yourself with United Way and your organization's campaign. United Way offers free campaign training sessions to help you learn more about the basics of campaigning, including best practices and ideas for raising more dollars.

You can also expect a call from your United Way Account Manager (AM), who will help you manage every step of your campaign. Your AM can help you review your organization's past giving, identify strengths and weaknesses, schedule campaign rallies, and bring you up to speed on United Way's impact in the community.

Early contact with your AM will also give you the maximum amount of time to plan each part of your campaign.

The Account Management Summary (AMS)

In your first meeting, your Account Manager may ask you to complete an Account Management Summary (AMS) form. The AMS provides United Way with your company's preferences for billing payroll deduction gifts, handling designated gifts, and more. This information allows United Way to provide donors with reliable and accurate customer service and lets you get to know your company's charitable-giving policies.

UNITED WAY
ACCOUNT MANAGEMENT SUMMARY - UWCLA
FY 2016/2017

1. COMPANY INFORMATION
Company Name: _____
Company Recognition Name (if different from #1): _____
2. HOCCO FRID: _____
3. Corporate or Headquarter Address: _____
Address: _____
Phone: _____
4. Workplace Ambassador (WA)
Name: _____ ext: _____ City: _____ State: _____ Zip: _____
Address: _____
Phone: _____ ext: _____ City: _____ State: _____ Zip: _____
5. Campaign Dates
Start Date: _____ End Date: _____
6. Campaign Processing
a) Yes No If yes, Start Date: _____ End Date: _____
b) EWAY (attach contract if due) IBI (attach contract if due) Systemwide
7. Does campaign involve multiple work locations?
a) Yes No If yes, attach list with location names and address
8. EMPLOYEE GIVING
a) Cash Check Credit Card Payroll Deduction Stock
b) Other (specify): _____
9. Will any or all pledges be through Continuous Payroll Deduction (CPD)?
a) 100% CPD Partial CPD NOT OFFERED
10. New Hire Program - Will new employees have the opportunity to pledge when hired?
a) Yes No If yes, annualize pledge based on start of calendar year If no, please attach sample
11. Fundraising Events - Will campaign include Special Events or Fundraisers?
a) Pledges/Pledge forms will be submitted (Check all that apply)
b) Submitted in total Separated by work location
c) Pledge forms will be forwarded to United Way via: _____
d) Picked up by UW Rep Mailed to United Way Rep
e) United Way of Greater Los Angeles United Way of Greater Los Angeles United Way of Greater Los Angeles
f) Accompanied by documentation Sponsorship or Electronic File
g) If your United Way representative is not available, please collect and submit pledge forms

AMS Form 2017 - UWCLA Last Revised 7.5.16 FD

2

Secure Support From The Top

Having the support of your top management is an essential part of your United Way campaign.

Your AM can help you develop a strategy for securing their active involvement in such ways as:

- Active endorsement of the campaign through a memo or email to employees
- Support of a Leadership campaign and their own gift at the Leadership level
- Recruitment of a Campaign Chair, Leadership Chair, and campaign committee
- Support of United Way through a corporate gift
- A budget for campaign activities and incentives

Power Tip!

When distributing campaign brochures and pledge forms, include a short letter of support from your organization's leadership!

Supporting United Way With A Corporate Gift

Securing your company's corporate gift prior to the campaign can show employees your organization's commitment to being a good corporate citizen.

Some companies choose to make a fixed corporate gift, while others choose to match employee donations dollar-for-dollar. In either case, a corporate gift should complement employee donations so employees know the company is as committed to the community as they are.

Benefits of Corporate Giving

- Enhanced reputation and positive name recognition in the community
- A sense of common purpose and goodwill within your company
- Healthier, more vibrant communities for you to do business in

Power Tip!

A corporate gift shows your organization's commitment to the community where its employees live and work.

3

Build a Strong Campaign Team

Your committee helps you run the campaign. The number of committee members you recruit will vary based on the size of your organization. Here are some of the roles you'll want to consider for your team:

Campaign Chair

Generally selected by top management, this individual is the key figurehead of the campaign. Sometimes, this individual is also the Workplace Ambassador.

Campaign Leadership Chair

This person chairs the Leadership Campaign and is responsible for soliciting gifts of \$1,000 or more. Generally a management figure, this individual should be a committed Leadership donor as well.

Previous Workplace Ambassador

If you are a new Workplace Ambassador, you may wish to ask the previous one to provide information on last year's giving.

Power Tip!

A diverse campaign committee will ensure that all levels of your company are well represented in the campaign.

General Committee Members

Include representatives from all levels of your company, including:

Labor: to speak at group sessions where Union members are present

Management: to solicit the management team

Payroll: to assist in processing pledge forms and provide reports on money raised

Marketing & Communications: to promote the campaign internally and externally

Retirees: to coordinate the plan for approaching this group for donations

Canvassers

Canvassers in every department and business branch help ensure everyone has the opportunity to give. While they do not need to be an active part of the core campaign committee, canvassers are a valuable resource for ensuring every person is asked to consider making a gift.

Training Your Team

Once you have assembled your team, you should plan a training session with your AM and Workplace Ambassador Trainer so each member knows how to run the best campaign possible.

Power Tip! 💡

Looking for skills training on public speaking? Effective e-mail communication? Social media tactics? The United Way **Workplace Ambassador Trainer** can create customized trainings and toolkits targeted to your committee's unique needs. Ask your AM for details!

Effective Training

- Educates committee members about United Way and the Pathways Out of Poverty fund
- Creates understanding of your organization's objectives in supporting United Way
- Teaches committee members and canvassers how to make an effective request for gifts
- Builds a sense of teamwork and motivation among your committee members
- Leaves team members with a clear understanding of their roles and responsibilities



4 Develop a Campaign Plan

After your team is assembled, you can begin to develop a plan of action. An appropriate amount of time should be spent planning your campaign so it runs smoothly.

Know Your History

With the help of your AM, look at trends for average gifts, percent participation, Leadership giving, and overall giving over the past five years. What are your strengths, and what can be improved? This will help you identify areas of potential growth as well as strategies to maximize giving.

	2015-2016
Corporate \$	
Employee \$	
Special Event/Other \$	
TOTAL \$	
# Employees	
# Donors	
% Participation	
Average Gift	
Total # Leadership Donors	
Total Leadership \$	
Average Leadership Gift	
Total # Tocqueville Donors	
Total Tocqueville \$	
Total # Women United	
Total Women United \$	
Total # Emerging Leaders	
Total Emerging Leaders \$	

Ask yourself:

- What trends can I identify?
- Is each trend a strength or a weakness?
- What does this trend tell me about my campaign and what are the opportunities for campaign growth?

Strategies for Growth

Now that you see where your greatest potential for growth lies, you can begin to select the strategies that will work best in your campaign. These strategies include:

- ⇒ A Leadership campaign
- ⇒ Increasing giving from current donors
- ⇒ Increasing employee participation
- ⇒ Involving, labor, new hires, and retirees

Power Tip!

One strategy for creating a fun and meaningful campaign is to develop a campaign theme that produces a unique experience for your company.

Increase Giving From Current Donors

- Personally ask the donor to increase his or her gift
- Encourage payroll deduction, which lets employees give more by spreading payments over time
- Make sure all employees know about opportunities for Leadership giving
- Use suggested giving guidelines (one percent of salary, one hour's pay per month, etc.)
- Structure incentives (i.e. giveaways) so that they are based on giving levels
- Establish a competition between departments based on percentage participating
- Hold group rallies with one-on-one follow up to solicit gifts
- Personalize pledge cards and include an endorsement letter from your campaign chair that suggests a gift increase of a certain percent
- Express appreciation immediately



4 Continued: Develop a Campaign Plan

Increase the Number of Donors

- Communicate CEO's support—ask your CEO to write a letter of support, attend group meetings, and make his or her personal gift prior to the start of the campaign
- Obtain endorsement and active support from all top managers, not just the CEO
- Recruit internal campaigners representing all levels and departments
- Rotate membership on campaign committees year to year
- Ask ALL employees to contribute through group rallies or one-on-one meetings
- Invite agency speakers to employee group meetings
- Find an employee who is willing to give a testimonial or share a personal story about how he or she benefited from United Way services
- Establish department goals/competition based on the number of participants
- Use incentives to recognize participation
- Collect pledge forms from all employees whether they choose to donate or not
- Recognize everyone for participating in the campaign



Richard Trumka, President of the AFL-CIO, left, and Brian Gallagher, President and Chief Executive Officer of United Way Worldwide, celebrate 75 years of partnership between the two organizations during the AFL-CIO 2016 Winter Executive Council Meeting in San Diego, CA, February 23, 2016.

Photo credit: Carlos E. LeGerrette



Involving Labor

This year, United Way Worldwide celebrated 75 years of partnership with the AFL-CIO. Locally, we partner with Los Angeles County Federation of Labor through Labor Community Services and Veterans Workforce, which connects post-9/11 veterans to union apprenticeships, and jobs that pay a living wage.

Union representatives or stewards can be valuable resources in your workplace giving campaign. If you have a union in your workplace that is interested in participating, please speak with your Account Manager to connect representatives or stewards directly to our United Way **Labor Liaison Manager**. The Labor Liaison Manager will be able to partner with the union on a strategy that best fits your workplace campaign.

For more information, contact Evangelina Nevárez at enevarez@unitedwayla.org.

Targeting New Hires

Some companies have successfully built United Way into their new hires' orientation. New employees are given the option to sign up for a payroll deduction or, at the very least, are made aware of the organization's commitment to supporting United Way and are ready to participate in your next campaign.

Retirees Program

Results show that asking retirees to participate in your campaign can provide added revenue, volunteers, and enthusiasm. Recruit your retirees' association or a well-respected retiree to help you plan a retiree campaign.

Setting Your Goals

Campaign goals should be set as a team and should be challenging, but achievable. The best goals are based on your organization's campaign history and the key strategies that you want to implement. You can also set goals that put you in the running for one of United Way's awards.

You can set many types of goals, including ones for:

- Overall giving
- Leadership donations
- Participation
- Average gift
- Giving by department

Keeping it Fun

In addition to raising money for our community, campaigns should be fun—a chance to feel good about helping others. Working with your theme, consider campaign activities that help people connect across departments and levels.

Fun activities may include:

- ⇒ A visit to a local United Way partner
- ⇒ Incentives such as gift cards, time off for participation, reserved parking spots, or casual day stickers
- ⇒ Bake Sales
- ⇒ Balloon or Flower Grams (for \$1 send a Thank You)
- ⇒ Managers Serve Breakfast or Lunch
- ⇒ Cube Decorating Contest

Power Tip!

In addition to setting an overall campaign goal, set goals to increase the number of Leadership donors, percent participation or average gift.

5 Promote & Prepare

Prior to and throughout your campaign, you should have a strategy for keeping the campaign and its key messages in front of your employees. Consider the following ways to promote your campaign:

- ⇒ Article in your company newsletter or on your intranet site before the campaign starts
- ⇒ E-mail that shares United Way success stories
- ⇒ Pledge reminders in paycheck envelopes
- ⇒ Employee participation in a volunteer project at a United Way partner agency

Campaign Materials

Each year, United Way of Greater Los Angeles produces localized campaign materials. Your AM can help determine which of these materials are right for your company's campaign.

General Campaign Printed Supplies

- Pledge Form
- Pledge Form (Spanish)
- Campaign Poster
- Campaign Brochure (Digital and Printed Versions)
- Campaign One Sheet
- Campaign Pledge Envelopes

THE POWER of UNITED WAY

United Way of Greater Los Angeles creates long-term solutions focused on **EDUCATION, HOUSING, and FINANCIAL STABILITY** – the keys to a brighter future. From providing vital services that immediately help those in need, to designing long-term solutions to our most pressing problems, United Way is creating pathways out of poverty.

Like you, we believe in a world where everyone has access to a quality education, stable housing, and a steady job.

United Way
GREATER LOS ANGELES

United for change. It begins with you. #UNITED4LA

<p>EDUCATION</p> <p>Over 42,000 students received top life skills experiences and resources since 2014.</p> <p>51% of kids are now graduating meeting the requirements for the UC system, compared to just 34% in 2010.</p>	<p>HOUSING</p> <p>Nearly 30,000 people have moved into permanent housing since 2014 through our Home for Good coalition and housing centers.</p> <p>United Way's annual HomeStart® gift to our partners has increased from \$6.5M in 2014 to \$12.0M in 2019, providing over 75,000 hours.</p>	<p>FINANCIAL STABILITY</p> <p>Since 2012, nearly 4,000 people's lives have been transformed.</p> <p>Over 200k+ over 7,200 low-income families have improved their financial health by receiving credit scores, savings, budgeting, and more budgeting.</p>
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Campaign One Sheet

TRANSFORMING LIVES THROUGH

<p>EDUCATION</p> <p>100,000 STUDENTS HOLDING HOPE But more than just hope, students need the resources and college resources.</p> <p>MAKING HER COLLEGE DREAMS A REALITY</p> <p>Through initiatives in support of the United Way's mission, there is funding for college and career readiness.</p> <p>As part of our Young Child coalition, we are working to ensure that every child has the opportunity to succeed in a quality school.</p>	<p>HOUSING</p> <p>47,000 PEOPLE HOMELESS + 3,000 ARE EVICTED</p> <p>A HOME TO CALL HIS OWN</p> <p>Home is a better place, but something that is not always easy to come by. United Way is working to help people find a place to call home. Through our Home for Good coalition, we are providing resources to get them back on the feet. With a roof over their heads, they can start working and building a better future for themselves and their families.</p> <p>Through our Home for Good coalition, we are providing resources to get them back on the feet. With a roof over their heads, they can start working and building a better future for themselves and their families.</p>	<p>FINANCIAL STABILITY</p> <p>1.9 million PEOPLE ARE LIVING THE POVERTY LINE</p> <p>Life is a struggle for many. While trying to make ends meet, it's hard to save money and plan for the future. United Way is working to help people build a better future for themselves and their families. Through our Financial Stability coalition, we are providing resources to help people get ahead.</p>
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United for change. It begins with you. #UNITED4LA

Campaign Brochure

TRANSFORMING LIVES
IN LOS ANGELES COUNTY

Like you, we believe in a world where everyone has access to a quality education, stable housing, and a steady job.

United for change. It begins with you.

#UNITED4LA
www.unitedwayla.org

United Way
GREATER LOS ANGELES

Campaign Poster

For additional resources, visit www.unitedwayla.org.

7 Make the “Ask”

It's important that every employee be given the opportunity to hear about United Way and be asked for a contribution. We know that **the number one reason people don't give is because they aren't asked.**

The most effective method of asking employees is through a group rally plus one-on-one follow-up. If your company uses pledge forms, they should ideally be distributed to everyone prior to group meetings, but can be distributed at a rally, provided you can ensure that everyone receives one.

Power Tip! 💡

Ask everyone to return a signed pledge form, even if they choose not to give. This will show you where to follow-up and ensures that everyone was asked to contribute.

The Perfect Group Ask

Follow these key steps for the perfect group solicitation:

- Welcome your audience—having snacks like cookies, coffee and juice never hurts
- Share any brief, positive, personal experiences you have had with United Way (a speaker, a tour, volunteering, receiving services, etc.)
- Give a brief presentation about the importance of supporting our community through United Way's Creating Pathways Out of Poverty Fund
- Share a story of someone whose life has been positively impacted by United Way
- Emphasize deadlines for returning pledge forms
- ASK those attending to give. Mention giving guidelines such as one hour's pay per month or 1% of their annual salary
- Make sure everyone knows about Leadership giving (\$1,000+)
- Be prepared to answer questions
- **THANK** the audience for their attendance and their donations

The **Workplace Presentation Specialist** and representatives from the **United Way Campaign Specialist** team are available to deliver effective and engaging presentations during your group meetings. Call your United Way AM for more information about bringing a powerful message about our community to your employees.

Power Tip! 💡

A group rally doesn't require an extra meeting. You can easily build it into a regularly scheduled meeting by asking for 10-20 minutes on the agenda.



The Perfect “One-On-One” Ask

Following these simple suggestions will lead you to successful one-on-one solicitations:

Before One-On-One Giving Discussions:

- Schedule a convenient time to meet
- Think about the employee. What are his/her interests?

During One-On-One Giving Discussions:

- Ask for gifts in private, 10-minute conversations
- Explain why you give
- Explain how United Way is meeting the needs and challenges in our community
- Ask open-ended questions and listen. Be ready to change your appeal based on what your co-worker tells you about his/her interests.
- Explain pledge forms and choices
- Be sure the employee knows about the added benefits of Leadership giving
- Ask for a generous gift and suggest:
 - * One hour's pay per month or 1% of their annual salary
 - * Payroll deduction pledge
 - * An increased pledge

Power Tip!

Provide training for your entire campaign team. Successful asks require knowledgeable campaigners who are comfortable asking for a pledge.

After all giving discussions, thank everyone, even non-contributors, for taking the time to listen and discuss our community

Giving Options

United Way offers a number of ways to make a gift:

Payroll Deduction

Donors can make their gift by having their annual pledge deducted from their paycheck. This deduction is spread out in equal increments over the course of the year, so a large gift can be made a little bit at a time.

Check

Some employees choose to make their gift by attaching a check to their contribution form. It is important that payments by check are given to United Way as soon as possible.

Credit Card

United Way accepts credit card gifts made through VISA, MasterCard, American Express, and Discover. Donors using this choice should contact United Way's Donor Services at (213) 808-6280.

8 Monitor Your Progress

As your campaign progresses, keep a running total of the pledges that you receive and communicate it back to staff. A fundraising thermometer in a popular employee area is a fun way to keep everyone up to date.

The Mid-Campaign Review

Hold a mid-campaign review with your team that includes the following:

- Review of goals and progress to date.
- Ask each person to report on the following:
 - Number of pledge cards returned / Number of online pledges made in their area
 - Estimated level of awareness (on a scale of 1-5) within their division
 - Their personal action plan for following up: "My next steps are..."
 - Help and support needed
- Discuss other plans and strategies as needed, such as special events or mini fundraisers
- Generate excitement—countdown to the last day
- Review next steps together



9 Report Results

To help you record your gifts easily and accurately, United Way has developed a dual envelope reporting system. In this system, there are envelopes for separating donors who are pledging to pay at a later date (as in payroll deductions) and those whose pledge forms are accompanied by payment.

Your AM can help you tally and prepare your contribution forms. **For complete instructions, see the back of the reporting envelopes.**

Reporting Results to Employees

Be sure to celebrate the success of your campaign by sharing your results with donors who made it possible.

Consider holding a campaign close event, such as a luncheon or other activity, and inviting donors and volunteers to celebrate your achievements.

Whenever possible, send a note from the campaign chair to each donor, thanking them for their support. **A sample letter can be provided by your AM.**

You should also convey thanks to the committee members who have helped you build your successful campaign.



THANK
YOU

We are grateful to have you as a
generous Leadership Donor.
Please join us in celebrating another year of
Creating Pathways Out of Poverty

Wednesday March 2, 2016
4 PM to 6 PM
The Jonathan Club - Wine Room
545 South Figueroa Street
Los Angeles, California 90071

Featuring Matthew Allnatt, Chip Lightfoot, and other special guests



Wine and light Hors d'oeuvres will be served
Complimentary Parking
Business Attire is Required





Continued: Report Results

Evaluating Your Campaign

Use this template to evaluate your campaign. Be sure to get input from your campaign committee when identifying strengths, weaknesses, and recommendations. Keep this report in your files for next year's campaign team and share a copy with your United Way AM.

Name of 2016/2017 Workplace Ambassador(s):

Name of 2016/2017 Campaign Leadership Chair:

List of campaign team members (committee members & solicitors/canvassers):

Campaign Results

Goal: _____

Total \$ Raised: _____

Summary of Campaign (timing, activities, etc.):

Strengths of Campaign:

Areas requiring improvement:

Recommendations for next year's campaign:

10 Stay Involved Year-Round

Too often, employees feel that United Way only comes around once a year when it's time to ask for money. You can help employees understand that their charitable investment is at work 365 days a year, helping people in need throughout Greater Los Angeles. Here are some ways to keep employees involved with United Way throughout the year:

- Take part in a volunteer project at a United Way partner agency
- Attend our annual Day of Action (June 2017)
- Participate in and recruit a team for our annual HomeWalk 5K
- Put updates on United Way programs in your employee newsletter or intranet
- Visit www.unitedwayla.org for United Way's community events
- Participate in the Loaned Executive Program

See **section 4** for more on United Way's year-round opportunities and recognition programs.

SECTION 2: 10 TIPS FOR CAMPAIGN SUCCESS

LEARN, REFLECT, AND SHARE

WHAT TACTIC DID YOU LEARN ABOUT THAT YOU ARE EXCITED TO TRY OUT?

TO WHOM CAN YOU TURN TO FOR FOLLOW-UP AND ADDITIONAL RESOURCES?

IDENTIFY ONE IDEA OR ACTION TO IMPLEMENT IN THE NEXT 30 DAYS.

MAP OUT YOUR TIMELINE TO ENSURE YOUR SUCCESS!



SPACE OF INFINITE POSSIBILITY
BRAINSTORM | DRAW | IMAGINE

SECTION THREE:
LEADERSHIP
GIVING

LEADERSHIP GIVING

Leadership gifts are personal gifts of \$1,000 more. A Leadership campaign is an important strategy in every top campaign. Giving at this level not only boosts campaign results, but Leadership donors also act as philanthropic role models.

While your Leadership campaign may target top management, Leadership giving is an option that is often welcomed by all levels of staff.

Depending on the size of the gift, Leadership donors enjoy special recognition and benefits. Below are the various giving levels in the United Way of Greater Los Angeles' Leadership programs.

UNITED WAY OF GREATER LOS ANGELES TOCQUEVILLE SOCIETY

A national philanthropic recognition program, the Alexis de Tocqueville Society honors those who want to make a substantial commitment to their community with a generous donation of \$10,000 or more. It was founded in 1984 to deepen the understanding, commitment, and support of United Way's most generous and community-minded investors. The Greater Los Angeles Chapter of the Alexis de Tocqueville Society includes prominent business and community leaders who have devoted time, talent, and funds to create long-lasting changes by tackling our communities' most serious issues.

The benefits of the program include exclusive invitations to networking and social events such as our Tocqueville Talks and the annual Tocqueville Gala, public recognition in the LA Business Journal and a special Tocqueville Society pin.

For information, contact Nuka Solomon at nsolomon@unitedwayla.org.



WOMEN UNITED

The Women United (formerly Women Leaders) program recognizes women giving \$2,500 or more annually to United Way of Greater Los Angeles. The program leverages the collective power and leadership of women to produce visible impact by Creating Pathways Out of Poverty in greater Los Angeles. Since its inception a decade ago, members of Women United have raised in excess of \$1 billion, with nearly 55,000 members in 140 communities.

Members of Women United enjoy exclusive invitations to networking and social events with like-minded individuals, invitations to volunteer opportunities, and a special “W” pin.

For information, contact Rebecca Edwards at redwards@unitedwayla.org.



UNITED WAY OF GREATER LOS ANGELES EMERGING LEADERS

Emerging Leaders recognizes individuals under the age of 40 who give \$1,000 or more annually to United Way of Greater Los Angeles. The program is comprised of passionate, young professionals creating lasting impact in their communities. There are 138 Young Leaders' Society programs worldwide with 52,000 members who donate their time, money and skills. Emerging Leaders activates young professionals to create pathways out of poverty through a lifetime of generosity.

The benefits of the program include through professional development, educational opportunities, volunteerism, and exclusive networking events.

For information, contact Julie Ordoñez at jordonez@unitedwayla.org.

LEADERSHIP GIVING

The Leadership Program recognizes those giving \$1,000 or more to United Way.

Leadership donors enjoy private recognition events, name recognition in the LA Business Journal, as well as exclusive privilege to join one of our affinity groups.



Power Tip!

Suggest to donors currently giving between \$700 and \$999 that they increase their gift to a Leadership level. Many may not be aware of the added benefits of making a Leadership gift.

RUNNING A LEADERSHIP CAMPAIGN

A Leadership campaign follows many of the best practices of your general United Way campaign—you will have a Leadership Campaign Chair, kick-off, solicitation process, pledge collection, and recognition. The biggest distinction is that your Leadership campaign specifically targets donors who have the potential **make a contribution of \$1,000 or more and should run about one week in advance of your general solicitations.**

Power Tips for Leadership Campaigns!

- Communication support from top management.
- Personalize the ask as much as possible.
- Let everyone know about Leadership options.
- Report Leadership gifts and donor names to United Way for proper recognition.

SECTION 3: LEADERSHIP CAMPAIGNS

LEARN, REFLECT, AND SHARE

WHAT TACTIC DID YOU LEARN ABOUT THAT YOU ARE EXCITED TO TRY OUT?

TO WHOM CAN YOU TURN TO FOR FOLLOW-UP AND ADDITIONAL RESOURCES?

IDENTIFY ONE IDEA OR ACTION TO IMPLEMENT IN THE NEXT 30 DAYS.

MAP OUT YOUR TIMELINE TO ENSURE YOUR SUCCESS!



SPACE OF INFINITE POSSIBILITY

BRAINSTORM | DRAW | IMAGINE

SECTION THREE:
YEAR-ROUND
OPPORTUNITIES

Other Ways to Get Involved

Your relationship with the community doesn't have to end with your campaign. United Way offers many ways to stay involved year-round.

1 LOANED EXECUTIVE PROGRAM

Each year, community-minded employers lend key personnel as full-time fundraising ambassadors in United Way's annual campaign. The participating organizations relieve the Loaned Executive of all job responsibilities, while continuing to pay usual compensation and minimal on-the-job expenses.

Participation in the Loaned Executive Program will add value to your company's loaned personnel by empowering them with new skills, new business contacts, and stronger abilities to carry out their jobs. United Way Loaned Executives expand their skills through training and experience in public speaking, communication, team building, customer service, sales, and closing.



2 DAY OF ACTION



Every June, thousands of people in more than 300 communities across the world will be volunteering through United Way to make their community a better place through Day of Action. On this day, we ask our partners to help put our mission into action by volunteering to improve the building blocks for a good quality of life – education, housing and financial stability. Look for your save the date information on the 2017 Day of Action or visit ww.unitedwayla.org.



United Way
of Greater Los Angeles

DAY OF ACTION

JUNE 17, 2016



CELEBRATE UNITED WAY'S NATIONAL DAY OF ACTION

Help give a hand-up to our most vulnerable neighbors, give back to your community and pledge to change our county for the better.




Friday, June 17, 2016

Participate in one of the following opportunities:

ADVOCATE	EDUCATE	SERVE
The Impact of Your Vote: Join us for a day of civic engagement and learn how to mobilize community members to engage in the democratic process. Time: 8:30 AM-1:00 PM Location: United Way of Greater Los Angeles, 1150 South Olive Street, 30th Floor Los Angeles, CA 90015	Professional Development: Provide professional coaching for students and adults working to advance in school and career. Time: 8:00 AM-12:00 PM Location: YWCA/ Job Corps, 1020 South Olive Street Los Angeles, CA 90015	High School Beautification: Support students by participating in a high school site beautification project. Time: 9:00 AM-3:00 PM 2 Shifts Available Location: East LA Performing Arts Magnet, 4211 Dozier Street Los Angeles, CA 90063

RSVP at unitedwayla.org/volunteer or volunteer@unitedwayla.org. Space is Limited!

3 HOMEWALK



HomeWalk is the United Way of Greater Los Angeles' signature 5K family run/walk that mobilizes thousands of Angelenos to raise awareness and funds to end homelessness in Los Angeles County. Over the past eight years, **75,000** walkers have come together to raise more than **\$6.5 million**.



100% of the proceeds from **HomeWalk** go back into the community, **housing 17,000** people since its inception. Every year, over **12,000 people** will join their friends, families, companies, and organizations to walk to end homelessness.

This year, we will celebrate the 10th Anniversary of HomeWalk on **Saturday, November 19, 2016** at **Grand Park**.

To register or for more information, visit us at HomeWalkLA.org.

4 VOLUNTEER AND ADVOCACY ENGAGEMENT

Getting your staff involved through volunteer and advocacy opportunities is a great way to see firsthand the work of your United Way and its partnerships in the community. Representatives from United Way partner agencies are also available to speak with your employees on a wide variety of topics and deliver a powerful message about the power of giving. Discuss what your needs are with your AM.

5 ANNUAL PHILANTHROPY AWARDS

United Way believes in rewarding excellence in community philanthropy, and has many recognition opportunities. Here are some examples of campaign awards that are presented at United Way's Annual Philanthropy Awards:

Spirit of Los Angeles – combined corporate and employee giving of at least \$500,000 to the Creating Pathways Out of Poverty Fund.

Outstanding Leadership Campaign – paying tribute to companies with the most Leadership donors.

Workplace Ambassador of the Year Award – recognizes the exemplary leadership and dedication of a top Workplace Ambassador.

Miguel Contreras Labor Award – recognizes the achievements of a labor group that has utilized their innate sense of caring to support United Way's fundraising campaign.

For more information on implementing strategies that will put your company in the running for these awards, contact your AM!



SECTION 3: YEAR-ROUND OPPORTUNITIES

LEARN, REFLECT, AND SHARE

WHAT TACTIC DID YOU LEARN ABOUT THAT YOU ARE EXCITED TO TRY OUT?

TO WHOM CAN YOU TURN TO FOR FOLLOW-UP AND ADDITIONAL RESOURCES?

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SPACE OF INFINITE POSSIBILITY

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**SECTION FIVE:
FAQs &
RESOURCES**

FREQUENTLY ASKED QUESTIONS

Q: What does UWGLA do?

A: United Way of Greater Los Angeles believes in a world where everyone has access to a quality education, stable housing, and a steady job – the keys to a brighter future.

Q: How does UWGLA do it?

A: United Way of Greater Los Angeles PARTNERS with nonprofit, business, government, and community leaders to design long-term solutions focused on EDUCATION, HOUSING and FINANCIAL STABILITY.

A: United Way of Greater Los Angeles MOBILIZES people in the community to take action.

A: United Way of Greater Los Angeles FUNDS 150 outstanding nonprofits throughout the region to provide vital services.

Q: Where does my money go? What impact will my donation have?

A: **30,000 people** – families, veterans and the chronically homeless – have been moved off the streets and into a home since 2011

A: **Veteran homelessness has decreased by 57%** in the last five years

A: **79% high school graduation rate** across LA County, **75% in LAUSD**

A: **Over 57,000 real-world career experiences** for students

A: **4,000 veterans** placed into jobs

A: **7,200 families** have improved their financial stability

Q: What makes UWGLA different from other nonprofits in L.A. County?

A: Many organizations treat the symptoms of poverty, or focus on one issue. We play a unique role in connecting partners across the government, business and philanthropic sectors to create long-term solutions to ending poverty while also providing immediate, short-term help to those in need by funding great nonprofit partners.

Q: Why should I give to UWGLA? Isn't it better to give directly to nonprofits that are doing the work?

A: By giving to United Way of Greater Los Angeles, your money can do more.

A: When you give to United Way of Greater Los Angeles, you're not only supporting the vital work on the ground, but you're also funding the long-term solutions that United Way of Greater Los Angeles helps create. Your donation will also impact the entire Los Angeles region, instead of just one community.

A: Our leadership role in L.A. philanthropy means that your money is used strategically and effectively, going even farther than direct services.

Q: Why should I be concerned about the poverty crisis?

A: Because poverty threatens the success of our businesses, our economy and the future of our community. Young people are trapped in low-wage jobs, leading to a lower tax and revenue base. Businesses struggle to find qualified workers and the growth in homelessness and the working poor leads to community instability and a diminished quality of life for all of us.

Q: UWGLA's work seems to focus only in the downtown Los Angeles area. How much of my donation will go benefit the community I live in?

A: Wherever you live in Los Angeles County, pockets of poverty and homelessness are not far away.

A: 90% of L.A.'s homeless live outside of downtown Los Angeles, so this is a problem for all of us to solve.

A: Our reach extends across Los Angeles County to all 8 regions, including Antelope Valley, Harbor/Southeast, Los Angeles, San Fernando and San Gabriel.

Q: What about that Aramony guy (a former CEO who embezzled money from United Way)? Why should I give to UWGLA if one of their CEO's embezzled money?

A: We can assure you that United Way of Greater Los Angeles believes in transparency. We are audited through a rigorous, third party process every year by a full team of auditors at Grant Thornton.

A: Are you familiar with Charity Navigator? It's a national service that does thorough evaluations on the transparency and financial legitimacy of 501(c)3 nonprofit organizations to help guide consumers on making intelligent choices for their giving.

A: Nonprofits are measured on financial health, accountability and transparency, and results reporting, and are rated on a 4-star system.

A: United Way of Greater Los Angeles is rated 4 out of 4 stars, designating it as an "exceptional" nonprofit that "exceeds industry standards and outperforms charities in its cause."

A: We provide Charity Navigator with the annual salaries of our CEO, executives, and financials, which is an example of our commitment to full transparency.

Q: What are UWGLA's administrative fees?

A: If you donate to our Creating Pathways out of Poverty fund, there is no administration fee, allowing your gift to reach more people in need. A fee is, however, charged for designated donations to any specific charity other than United Way (e.g. the Red Cross or Children's Hospital). Standard administrative fees are 8% for eWay electronic processing and 9% for all other processing, with a maximum fee of \$500 per year, per donor. These fees help cover the cost of our internal controls and infrastructure needed to provide the highest level of quality assurance to our donors.

Q: What is UWGLA's overhead rate and how does it compare to other non-profits?

A: The Better Business Bureau says that a nonprofit's overhead should not exceed 35%.

A: United Way of Greater Los Angeles maintains an overhead of just 15%.

A: Similar nonprofits average approximately 18%, and the American Red Cross is 22%.

A: We have a four-star rating from Charity Navigator.

FREQUENTLY ASKED QUESTIONS CONTINUED

Q: Is my gift tax deductible? How do I receive tax credit for my gift?

A: Per IRS Guidelines nonprofit organizations are required to provide receipts for one-time gifts of \$250 or more made in the prior calendar year by check, credit card, cash, and/or stock. A tax substantiation letter will automatically be sent to the address provided on your pledge form by January 31st. This process excludes payroll deduction gifts. To prove full payment on a payroll deduction gift, you will need to use your end-of-year pay stub as documentation.

Q: My senior manager has a question about their major gift donation, who should I contact?

A: Each Major Gift donor and Affinity Group member has their own Major Gift Officer personally dedicated to helping manage their philanthropy and charitable giving. Please contact our Major Gifts Internal Support at lsoto@unitedwayla.org for any related inquiries or assistance.

Q: What are the requirements to designate to another nonprofit organization?

A: You can give to one or more agencies that hold a valid 501(c)(3) certificate or to any IRS-qualified organization. Please note that each designated gift must be \$26 or more. Gifts less than this will be treated as a donation to the Creating Pathways out of Poverty fund.

Q: When will my gift be distributed to my designated agency?

A: United Way pays designations on a monthly basis to agencies signed up for direct deposits through DesigWeb, our electronic funds transfer system. Agencies not signed up for direct deposits are paid on a quarterly basis during the months of February, May, August and November when there are funds available.

Q: What do I do if I want to cancel my payroll contribution?

A: You will need to take 2 steps: First, contact your payroll department and request that they cancel your automatic payroll deduction. Next, contact the United Way's Donor Services Department via email to advise of the cancellation and the effective date.

Q: Will my personal information be released to my agency?

A: Your designated agency will receive detailed reporting about your gift, and if you have provided your information on your pledge form, they will receive that if they wish to thank you directly. If you indicate on your pledge form that you wish to remain anonymous, your information will not be shared.

DONOR SERVICES OVERVIEW

As a Workplace Ambassador, you'll receive questions from your peers regarding their donations, United Way is here to help! Use our Donor Services Department as a tool to help provide donors in your workplace with excellent customer service when it comes to their charitable giving.



United Way Donor Services Department

Telephone: (213) 808-6280

Email: donorservices@unitedwayla.org

Monday through Friday 8:30AM-5:00PM

For inquiries regarding Affinity Group and Major Gifts, please contact our Major Gifts Internal Support at:
lsoto@unitedwayla.org

Our Donor Services Department serves as a key contact for all donors, agencies and companies. We provide customer service for all campaign operations and resolves issues and concerns relating to:

Donor pledges (new and existing gifts)
Understanding specifics of company processing
Payout process to designated agencies
Updates /changes to donor gifts and designations

Contact your United Way Representative or our Donor Services Department for any additional information.

POLICIES AND PRACTICES

There are nearly 1,800 independent United Way organizations nationwide. While each adheres to a national set of professional standards, each one has its own board of directors and individual policies for gift processing.

The policies included on the following reflect those of United Way of Greater Los Angeles; other United Ways may have their own policies that differ from those described here. These policies will apply to all gifts from your company that United Way of Greater Los Angeles is asked to process—even those from employees in areas served by other United Ways.

Account Management Summary (AMS) Form

The AMS Form (mentioned in the 10 Steps to Success) records your company's key contacts and preferences for billing payroll deduction gifts, handling designated gifts, and more. This information allows United Way to provide you with the highest level of customer service and provides you with a summary of how United Way will process and payout gifts from your employees.

Your Account Manager will work with you in filling out the most up to date information on this form before your campaign starts.

Gift Processing Fees

United Way of Greater Los Angeles is committed to helping companies and individuals fulfill their philanthropic goals at the lowest cost possible. Different types of designated gifts carry a different cost for collecting, processing and disbursing the gift. Here are the most common fees for processing designated gifts through UWGLA:

- 8% eWay Campaigns: Companies using UWGLA's pledge capturing site, eWay are subject to an 8% processing fee not to exceed \$500.
- 9% Standard Processing Fee: For campaigns processed by UWGLA through paper pledge forms
- 10% Individual Based Processed: Fee applied to designated gifts processed using this IBP method

Power Tip!

Any gift to United Way of Greater Los Angeles' Creating Pathways out of Poverty fund (CPOP) are not charged a fee! All other fees do not exceed \$500 per donor per year. Any donor giving a minimum of \$5,000 to CPOP has all processing fees waived.

(Please see Account Manager to discuss your unique processing fee for your company)

Donor Acknowledgments

Donors meeting certain gift criteria will receive letter acknowledgments once their gift is processed by United Way. These acknowledgments include:

- Acknowledgment of Gifts Received: Any gifts of \$100 or more processed by United Way will receive an acknowledgment letter, letting the donor know we have received their gift, and how the gift is to be allocated
- Tax Substantiation Letters: United Way will send a tax letter for all one time, paid in full gift of \$250 or more. These letters are sent in January and February of the following year.

Power Tip!

Donors giving via payroll deduction will not receive a tax letter. They should use their year-end paystub in conjunction with their Acknowledgment Letter for tax purposes.

Gift Disbursement

United Way of Greater Los Angeles pays out designated gifts to agencies meeting the following criteria:

- Valid 501(c)3 Organization
- Follows IRS Guidelines
- Compliant with the Patriot Act

(Minimum amount to designate to an organization is \$25)

Agencies have the option to sign up for our DesigWeb program, where they can receive funds via ETF Transfers on a monthly basis (when eligible funds are available).

Agencies not on DesigWeb will receive a manual check on a quarterly basis in the months of February, May, August and November.

NOTE: Policies listed here apply to campaigns that are processed by United Way of Greater Los Angeles. For information regarding to campaigns processed elsewhere, please contact your Third Party Processor.

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**UNITED FOR CHANGE.
IT BEGINS WITH YOU.**

#UNITED4LA

BROUGHT TO YOU BY YOUR UNITED WAY TEAM

