

GLOSSARY OF UNITED WAY TERMS

Account - A workplace/organization invited to financially participate in the campaign.

Administrative Costs - Funds needed to carry out the day-to-day functioning of the nonprofit organization. Administrative costs can include payroll, maintenance of facility, legal activity, etc. This number is added with the fundraising cost and reviewed as a percentage of expenses to determine the organization's efficiency in getting donor money to program impacts. Administrative and Fundraising percentages should stay under 25% for an organization to be considered a well-run non-profit.

Agency/Program Tours or Site Visits - Visits designed to offer an on-site education of how United Way's donor dollars are put to work and community services are delivered. To request an Agency Tour or Guest Speaker into your workplace, companies and LEs are asked to contact the UWEC Campaign Department or fill out a **Speaker/Tour Request Form**. This form should be completed and submitted within two weeks of the meeting/tour date to allow for adequate coordination time.

Average Gift - A total gift from a company's employees, divided by the number of givers.

Board of Directors - Volunteer group of community leaders who govern the operation and oversee the financial stability of United Way.

Prospecting Team - High-profile business leaders and volunteers who recruit organizations to join the Annual Workplace Campaign.

Campaign Finale - Special event at which the results of the Annual Workplace Campaign are announced along with the recipients of the Community Investment Committee grants.

Campaign Kickoff - The formal start of the campaign. The event typically receives community-wide attention.

Campaign Materials Packet - Items given to all workplace coordinators in order for them to run a campaign. Items include pledge sheets, posters, brochures, and reporting envelopes.

Campaign Reporting Envelope - Envelope given to each Campaign Coordinator to complete and turn in to United Way at the completion of their workplace campaign. The contents of the envelope should include the following: white copies of all completed pledge cards and any cash or check donations received by the company during the campaign. An account of the envelope's contents is balanced by the workplace, and this information is gathered on the outside of the envelope, along with all company information. Campaign Coordinators are encouraged to submit partial results when they deem necessary.

Campaign Video - A video used to educate and inform local audiences about the United Way movement in an effort to encourage giving.

Community Campaign Goal - The overall campaign goal set by members of the United Way Staff, Campaign Chair, and Board of Directors.

Community Impact - Impact created by mobilizing communities to create lasting changes in community conditions to improve lives.

GLOSSARY OF UNITED WAY TERMS (CONT.)

Corporate Gift - An annual contribution that is made in the name of a business or organization to UWEC.

Day of Caring – Is Northwest Florida’s largest one-day volunteer event that was created on behalf of United Way of Escambia County’s funded agencies and Escambia County schools. The Day of Caring Committee matches over 1,300 volunteers to non-profits or schools submitting a project.

Designation - An option provided to donors during the campaign that allows donors to direct their contributions to a specific 501c3 agency or program.

Diamond Donor - Any individual or couple who has contributed to any United Way for 25 years or more. Diamond Donors are recognized in the United Way of Escambia County Annual Report.

Division - A United Way grouping of campaign accounts that are classified according to similarities in their makeup: Agency, Corporations, Financial Institutions, Government, Health, Retail, and Small Business are the current divisions.

Emerging Leaders Society - The Emerging Leaders Society recognizes donors ages 21 to 40 who contribute a minimum of \$365 (\$1 a day or more) annually. Emerging Leaders commit to LIVING UNITED 365 days a year through their giving and other volunteer and advocacy efforts. Emerging Leaders are recognized in the United Way of Escambia County Annual Report.

Community Investment Committee (CIC) - United Way donors recommend how to allocate the undesignated contributions from the campaign. They spend approximately 40 hours reviewing program applications, touring program sites, and listening to oral presentations. After a thorough review and deliberation, they make recommendations to the UWEC Board for the best way to invest funds. **The only requirement to be a Funds Distribution volunteer is that you must be a donor.**

Funding requests for programs only (not agencies) receiving funds from United Way in prior years are broken down into 3 areas (panels) reflecting United Way’s commitment to the most pressing needs in our community. These panels are: 1) Education 2) Health 3) Financial Stability

Fundraising Expense - Dollars used to raise funds necessary for programs to be fully funded.

Giving the UNITEDWAY - The money directed to the general UWEC campaign is the money that the Community Investment Committee will meet and determine how to invest into area programs.

Leadership Giving - Gifts from donors, beginning at \$1,000 and ending at \$9,999.

Loaned Executive (LE) - Someone who volunteers or is “loaned” from local, community-minded businesses to the United Way to help run workplace campaigns. Loaned Executives learn more about the needs in our community while strengthening their leadership skills and knowledge that will make our community stronger.

Pacesetter - Company agrees to specialized advance preparation and solicitation. This campaign is designed to provide an example and build enthusiasm for the general countywide campaign. Pacesetter campaigns take place between July and mid-September and provide significant dollars early in the campaign.

GLOSSARY OF UNITED WAY TERMS (CONT.)

Per Capita Gift - The campaign measurement arrived at by dividing the total employee or corporate gift by the total number of employees at the company.

Pledge - A promise to make a contribution in installments over a specified period of time.

Pledge Loss - Accounts for pledges made but not kept, usually as a result of employee turnover.

Prospects - Potential workplace contributors to the campaign.

Spirit of Giving Award - Spirit of Giving Awards are presented to schools and workplace campaigns in four categories at the Campaign Finale Event. Winners are selected based on improved campaign performance, participation, growth in financial giving, and exhibition of employee pride and enthusiasm.

Tocqueville Society - Members of the Tocqueville Society give \$10,000 or more to United Way on an annual basis.

2-1-1 - is a comprehensive information and referral system accessible 24/7 by dialing the three digits—211—or via their website www.211nwfl.org, that contains the full resource database for 9 counties. This program of United Way of Escambia County is focused on health and human service needs for 40,000 callers annually and offers services to 8 additional counties in northwest Florida.

UWADA- The United Way Agency Directors Association (UWADA) is a coalition of Escambia County agency CEOs who direct a diverse group of non-profit certified United Way agencies. UWADA works collaboratively to find solutions to community issues relating to health, housing, education, poverty, economic development, and the environment. Certification as a UWADA member may be applied for at any time during the year. However, to be considered for funding through the funds distribution process, a United Way Funded Agency Certification packet must be submitted to United Way.

VITA - Voluntary Income Tax Assistance is an IRS initiative to promote and support free tax preparation service for the underserved, low-income populations. United Way recruits volunteers to help prepare tax returns for those with low-to-moderate income who cannot prepare their own tax returns.

Workplace Campaign Meeting- A brief (5 to 30 minute) meeting, held on company time, at which groups of employees learn more about United Way and the campaign through videos, agency speakers, and United Way staff. Employees are given pledge cards or directed to an online giving site and asked to make informed giving decisions.

Workplace Coordinator - The person within a company assigned to run the company's United Way campaign. This person works directly with the Loaned Executive to create a fun campaign that is highly successful.