



LIVE UNITED® GIVE. ADVOCATE. VOLUNTEER.

Campaign Tool Kit 2011

United Way of the Ozarks

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www.uwozarks.com

Running A Successful Campaign

Thank you for volunteering to be the Campaign Manager for your United Way Campaign! Your contribution of time and talent is important to the United Way and our community. Your family, friends and neighbors depend on United Way to raise critical dollars needed to deliver local health and human services. We appreciate your willingness to serve!

✓ Step One – Prepare for Your Role as Campaign Manager

Educate. Motivate. Organize. Report. Your essential role is to provide enthusiasm and excitement to your company's campaign. Educate fellow employees about the United Way and how it works in our community and give them the opportunity to contribute. Your leadership, organization and enthusiasm are vital!

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✓ Step Two - Plan

- **Analyze Your Last Campaign**
 - What were the strengths / weaknesses of last year's campaign?
 - How much did your employees contribute last year? (Total Employee Gift)
 - What percentage of employees contributed? (Percent Participation)
 - What was the average amount donated by employees? (Per Capita Gift)
 - What was the corporate contribution? How is that determined?

- **Get Help – Build and Train Your Team** - If you are a Campaign Manager for a large business (more than 50 employees), ***don't do it alone!*** Ask volunteers to serve on a campaign committee. Assign members tasks such as promotions, implementations and follow-up. Your ***Campaign Team*** can help spread enthusiasm and information about United Way and your company campaign. Recruit a campaign committee that represents all segments of your organization including management, salary, hourly and union employees. Committee members should be viewed as effective leaders within your organization.
- **Look to the Top for Support** - Meet with your CEO/Senior Manager to:
 - Ask them to secure the corporate gift
 - Secure their personal commitment to the campaign
 - Encourage them to send a powerful message of support and concern for our community by personally endorsing your United Way campaign by:
 - Writing a letter to employees endorsing the campaign
 - Appearing at employee rallies and meetings
 - Soliciting the top management to set the pace for the campaign by giving at the leadership level (\$500 and above)
 - Approving the employee campaign goal
 - Asking if the company will provide incentives for your campaign

✓ **Step Three – Organize**

- **The Employee Campaign Order Form**, is a vehicle for you to communicate with United Way about your campaign needs.
 - Fill in the information at the top of the sheet.
 - List all dates and times you will have campaign meetings.
 - Check which additional supplies you will need.
 - Fax the sheet to your campaign staff at **417.863.9102** who will arrange speakers for your meeting and will fax back a copy of the form after speakers have been confirmed.
- **The Corporate Pledge Card:** Please provide your company information on the Corporate Pledge Card.
 - It must be signed by your CEO or someone authorized to make corporate contributions.
 - Indicate if , how and how often you want to be billed

- **Payroll Deduction Forms:** Make sure you have enough for every employee at your company. These are newly designed, so please review them before distribution.
 - Individualize pledge forms for employees with the amount of the previous year's gift.
 - For gifts over \$500, check the appropriate box (Leadership) on the form.
 - ***Your payroll department will keep the yellow copies, send the white to United Way office and give the pink to the donors.***

- **Set a Goal** - look at last year's results. Did you have low participation? Maybe your goal could be to increase employee participation. Or perhaps you had a low average gift. You could set a goal to increase per capita giving to \$25, \$50, \$75 or \$100. See the employee award levels below to help you set a goal. Assign a goal to each department.

- **Conduct a Company Campaign Kick-Off.** Start your campaign off right. Get employees excited about United Way by using creative ways to make your campaign educational and fun. You could distribute personalized pledge forms at the kick-off or distribute them ahead of time and have them turned in at the kick-off. These donors would be eligible for prize drawings. This allows the committee to focus their follow-up calls on those employees absent from the kick-off.
 - **Helpful hints:**
 - Schedule your kick-off so your CEO and senior management attend this is a strong message of support.
 - Pick a creative campaign theme and/or think of other imaginative ways to involve employees in United Way. See our website for the Great Ideas Book.
 - Invite Campaign Leadership, the United Way CEO, your United Way staff person and a representative from a United Way agency to speak to your company employees.

- **Announce the Company Goal** - Post your company goal in break rooms or on bulletin boards. For unique ideas, see "Fun Ideas for Your Company Campaign" in this guide and on our website www.uwozarks.com

- **Promote and Publicize your Campaign** – Use signs, bulletin board notices, email, voice mail and letters. This information is provided in your Campaign Communications Kit and on our website www.uwozarks.com

- **Create Friendly Competition**

- **Include United Way Information in Company Publications.** Sample stories are included in the Campaign Communications Kit.
- **Schedule Employee Meetings and Contact United Way to Arrange for Agency Speakers, Videos, etc.** Use the Employee Campaign Order Form provided in your packet to schedule speakers, request assistance and materials.
- **Distribute personalized pledge forms:** Plan ahead so you can label or print each employee's name on a pledge form before meetings. This makes tracking outstanding pledge cards much more manageable. Personalized cards send the message that every gift, regardless of its size, is important.
- **100% return of cards** (givers and non-givers) is considered an essential safeguard to ensure accurate campaign record-keeping and that everyone has been asked.

✓ **Step Four – Coordinate Group Meetings & Make the Ask**

One of the most important elements to a successful campaign is your employee group meetings. Employees gain a thorough understanding of community needs, United Way's role in meeting those needs and why your organization supports United Way. There are many different ways to ask employees for contributions to your United Way campaign. The important thing is to make sure that your employees are well informed about United Way, our partner agencies and know that the dollars they contribute will be used to help people throughout the Ozarks.

- **Schedule and publicize every employee meeting in advance.** Use posters, company newsletter & other communications to notify employees of the meetings.
- **Schedule enough meetings so that every employee can attend.** This may mean having meetings at 2 AM to reach third shift employees. United Way can accommodate meetings at any time.
- **Send reminders to employees several days before group meetings.**
- **Establish a plan for follow up with anyone unable to attend a meeting.**
- **Offer incentives & highlight special events:** Creative and low-cost incentives can be awarded to boost attendance at employee meetings,

for high participation rates, to encourage giving at a certain level, for getting pledge cards in on time, etc. "Fun Ideas for Your Company Campaign" in this guide and on our website www.uwozarks.com

- **Ask an employee who has benefitted from a United Way Agency Partner to share his or her experience with other employees**
- **Schedule a representative from United Way's Speakers Bureau** (Agency Partner employees) to talk with your employees about the programs and people who have directly benefitted from their agency's program
- **Show the United Way Campaign Video**
- **Distribute the Campaign Brochure**
- **Assure employees that their contributions are being used effectively and efficiently**

Another objective is to solicit support for United Way by asking employees to pledge a contribution. You should view group meetings as a structured sales call and end it with an appropriate close that makes the all important ask. To make an effective close, incorporate the following elements:

- Make confident, assumptive statements, for example, ***"As we have seen, the United Way helps where help is needed most."***
- Summarize for your audience the key benefits that they derive from their support of United Way. Example: ***"When you support United Way, your money is used wisely and well. United Way is cost effective and accountable to the public."***
- Gain your audience's consensus about United Way by stating key points or benefits that everyone appears to agree with. Example: ***"It's important that our community has these programs and services available for all who are in need, and United Way plays a key role in making them possible. Without support from people like you, this would not be possible. Please consider a gift to the United Way of the Ozarks."***
- **Encourage employees to contribute or increase their contribution**

✓ Step Five – Promote Leadership Giving

Promote the United Way Leadership Giving Program to appropriate employee groups. Leadership Giving is a recognition program for contributors who make an annual gift of \$500 or more to the United Way of the Ozarks. This program identifies leadership giving, raising the level of expectation among those individuals whose income could allow for a greater gift. This in turn raises giving among other groups.

- Solicit executives and managers prior to the general campaign. Ask them to consider a Leadership Gift, and give them the United Way Campaign Brochure.
- Announce the total results of your Leadership Giving at your company-wide kick off.

✓ Step Six - Individual Award Levels

- **Circle of Change** - \$500 or more annually (\$9.62 weekly)
- **Leadership League** - \$1000 or more annually (\$19.23 weekly)
- **Pillar Society** - \$2,500 or more annually (\$48.07 weekly)

✓ Step Seven – Wrap Up & Report Results

Campaign Reporting: It is crucial that you complete your campaign and report the results to United Way within two weeks of completing your campaign to ensure that United Way has an accurate overall campaign total to report to the community.

- **Designation Preference Form:** To notify United Way of all donors who wish to designate their gift to a certain agency. Payroll deduction cards have a place under the signature where donors can designate to a particular agency. Designations can be made only to United Way member agencies or initiatives. A list of agencies appears in the campaign brochure.
- **Leadership Giving Enrollment Form:** To notify United Way of all donors who give \$500 or more annually.
 - Please complete all requested information and identify new leadership givers

- **Report Envelope:** To provide accurate information regarding corporate and employee gifts as well as the number of total employees and number of givers.
 - Fill out the entire envelope – follow instructions at the top.
 - Keep the yellow copies of the payroll deduction forms.
 - Enclose white copies of pledge cards, cash and checks
 - Enclose signed corporate pledge card
 - Record your corporate gift on the line marked “Corporate Pledges Only.”
 - Record gifts of cash and checks on the lined marked “Cash (including checks)”
 - Record payroll deduction pledges on the line marked “Payroll Deduction Pledges”
 - Record direct billing pledges on the line marked “Direct Billing Pledges”
 - Records funds from special events on the line marked “Special Event”
 - Bring the totals down to line marked “Total”
 - Complete “Total number of persons employed in organization”
 - Complete “Total number of FTE (if different)”
 - Check how your company wants to be billed.
 - **An authorized signature is required** before you return the signed Report Envelope to your United Way staff person. –
 - **Please remember that accurate reporting is important to United Way and your company!**

Critique your campaign. When your company campaign is complete, evaluate the effectiveness of your plan. Do this while the campaign is fresh in your mind. It will be a great help to assist you in running an even better campaign next year. A good critique will identify strengths and potential opportunities. This is a good time to make notes about the campaign for next year.

- How successful was this year’s campaign?
- What areas were most/least successful?
- What recommendations do you have for next year’s campaign team?

✓ **Step Seven – Say Thank You**

Saying **THANK YOU** is the most important element in winning the long-term positive support you worked so hard to achieve. Thanking employees helps reinforce positive feelings throughout your company. Also thank the CEO for their involvement in the campaign.

- Announce/Post your final campaign results and thank employees for their combined generosity.
- Thank your committee through memos, emails and staff meetings.

- Help us say “thanks” by turning in your Campaign Report by **October 31**
- **Host a company-wide thank you event.** Invite someone from the United Way and/a partner agency to offer a personal “thank you” to your employees.
- During a **Thank You Rally**, distribute certificates and/or plaques and United Way pins to your Campaign Committee, Leadership Givers and departments with the highest increase.
- **Host a Leadership Circle Thank You Event:** Consider holding a special event for the leadership givers and/or prospects in your company.

✓ **Additional Campaign Suggestions**

- **Start a year-round New Hire program.** Solicit new employees at their time of hire. Special New Hire brochures are available from your United Way staff member and can easily be added to your new employee orientation materials.
- **Solicit retirees.** Consider including company retirees in your campaign by sending a letter of solicitation along with a pledge card and a return envelope. Contact your United Way of the Ozarks staff person for additional pledge cards.
- Recruit a group of employees to participate in the United Way Day of Caring, a day when corporations and organizations in our community lend a hand to United Way member agencies
- Ask one or more of your employees to participate in the Community Investment process to see how money is distributed by United Way to its member agencies

✓ **Sample Agenda for 20 Minute Meeting**

- I. Welcome – Employee Chair (one minute)**
 - A. Greet employees**
 - B. Distribute brochures and personalized pledge cards**
 - C. Outline purpose of meeting.**
 - D. Introduce CEO or management representative**
 - E. Introduce labor relations representative (if applicable)**

- II. United Way Endorsement (two minutes) – CEO/Senior Management & Labor Rep**
 - A. Explain corporate gift support by CEO**
 - B. Endorsement by labor leader or employee who has used United Way services**

- III. United Way Speaker & Video (13 minutes) – Employee Chair & UW Representative**
 - A. Introduce speaker**
 - B. United Way message**
 - C. Video**

- IV. Campaign Information and Closing Remarks**
 - A. Thank the speaker**
 - B. Explain the pledge card, payroll deduction and any incentives**
 - C. Ask for gift**
 - D. Ask employees to complete and hand in their cards before they leave**
 - E. Offer to answer questions**
 - F. Thank employees for their support!**

Fun Ideas for Your Company Campaign

Incentive Ideas

1. Paid day off
2. Fitness club membership, gas cards, movie passes, restaurant cards, parking spots

Kick Off Ideas

1. CEO, United Way rep, celebrity speak
2. Offer employee testimonials
3. Show video
4. CEO kisses something gross: Mule, horse,
5. Separate Leadership Circle kick-off
6. Stunts by CEO and/or Manager(s)

Always include food!

1. Lunch with the Boss
2. Potluck lunches/dinners
3. Pancake breakfast
4. Bake sales
5. Meal at an agency
6. Dessert auction
7. Cookbook sales
8. Chili, burger, chicken cook-off
9. Ethnic food lunches
10. Candy gift bags
11. Root beer floats
12. Banana split sales
13. Catered steak lunch
14. Ice cream social
15. Lunch with CEO
16. Guess how many in a jar (beans, M&Ms)
17. Pumpkin carving contest; then auction
18. Iron Chef competition

Fun Events

1. CEO obstacle course
2. Company execs & staff trade places for ½ day

3. "Flea-Bay" White Elephant Sale
4. Office Diva – pay to vote for Office Diva; Divas distribute crowns to givers
5. Prettiest/Ugliest Pet Contest – small entry fee and pay to vote
6. Remote control car/boat races
7. Aluminum can recycle
8. Balloon dart toss with prizes
9. Balloon sales
10. Basket sales/auction
11. Billboard advertising
12. Candle fundraiser
13. Car dealer tail-gate party
14. Classic car show
15. Desk massages
16. Dunk tank
17. Email/ Intercom Bingo \$1 cards
18. Grab bags of coupons
19. Jeans week/\$5 for a week
20. Sell services from execs
21. Shorts day
22. Silent and/or live auction
23. Soak your boss /kiddie pool & water gun
24. Theme competition
25. Used book sale
26. Video game contest

Campaign Best Practices

1. Agency tours
2. Banner of agencies – put color dots on agencies you have visited
3. Corporate Challenges
4. Corporate match
5. Early bird drawings
6. Email congratulations
7. Executive Tours of Agencies
8. Incentives to turn in pledge cards

9. Invite people to be team members, don't wait for volunteers
10. Management participate in Day of Caring
11. Send emails to update on progress
12. Start campaign early in the year
13. Use monthly employee meeting to give out pledge cards
14. Use payroll deduction
15. Year round reminders of need

Campaign Ending Celebrations!

1. Antique car show
2. Campaign committee dressed as celebrities
3. Carnival with tents, booths and dunk tank
4. CEO rides stick horse if goal met
5. Chili cook-off/lunch
6. Company BBQ
7. Cookie party
8. Cook-out for employees
9. Donuts and coffee
10. Leadership Circle donors breakfast with CEO

Creative Goal Presentations

1. Building being constructed and completed as goal is reached
2. Gas Tank
3. Going Up/Airplane
4. Hot Air Balloon
5. Hurricane Lamp filled with candy as campaign progresses
6. Ladder
7. Monkey in a tree – climbs higher and higher
8. Office Olympics with torch as thermometer

9. Oil Derrick
10. Race track – car moves to show where campaign is
11. Rising to the Challenge/Hot Air Balloon
12. Route 66
13. Sailboat
14. Your Share of the Pie

Helpful Information & FAQ's About United Way

- United Way of the Ozarks traces its beginning to 1930, when a group of committed people built upon the familiar spirit of giving by many for one goal. The mission then and now remains the same: ***To increase the understanding of human needs and mobilize resources to meet those needs.*** Today United Way's 28-member board and **2000+** volunteers are working to address the critical issues identified in the Community Focus report that face our community. Our Campaign raises funds to support 40 funded programs for our 23 partner agencies and eight initiatives.

Contributions to United Way of the Ozarks work in the following issue areas:

- **Access to Healthcare** – Concentrating on providing appropriate behavioral counseling and necessary medications for the underinsured
 - **Healthy Families** – Helping to provide resources for healthy lifestyles for families
 - **Basic Needs/Self Sufficiency** – Focusing on providing housing and economic education
 - **Safe Neighborhoods** – Concentrating on community safety and disaster relief
 - **Successful Youth** – Building strong character education with positive role models
 - **Children At-Risk** – Programs focused on those who cannot speak for themselves
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- **United Way is the source of the largest sum of private, unrestricted funds to Ozarks area nonprofit organizations**
 - United Way helps more people in our community than any single health and human service organization
 - **United Way is a catalyst for change** by bringing Southwest Missourians from business, nonprofits, labor, government and faith groups together to find long-lasting solutions for community wide issues
 - United Way not only addresses immediate needs, but also focuses on finding the underlying causes and working to create change for the community's most critical "red flags"
 - **United Way administrative cost is only 10-12%.**

- **Over 100 United Way volunteers** review community impact areas and agency programs to ensure that your donations are directed where they will have the greatest impact and help to prevent problems from happening in the first place.
- **United Way 211** is a non-emergency hotline that enables people to talk with a real person about services they may need in the community including those not related to United Way.
- **United Way Day of Caring** is a mobilization of volunteers who work build, clean, repair, paint, plant, cut, mend, organize and perform many other tasks that would not get done at United Way Agency Partner locations. The 2009 Day of Caring mobilized 1,400 volunteers who completed over 150 projects, and is one of the largest Days of Caring in the USA.
- **Female Leaders In Philanthropy (FLiP)** is a network of women helping women. They are dedicated to changing our community for the better and creating more positive outcomes. FLiP is focused on three critical issue areas – Children At-Risk, Basic Needs & Self Sufficiency and Healthy Families. In 2011-12, FLiP will focus on helping to sustain the Ozarks Food Harvest Backpack Program and continuing to growing the Suit Yourself program, which helps provide suitable workplace clothing for women who are re-entering the workforce and growing the newly formed Mentoring Program.
- **Hands on for Seniors** is a United Way project made possible by a grant from the Greene County Senior Citizens Tax Fund that helps seniors with minor home repairs and yard clean up if the senior is unable to physically or financially get the project done. These projects are all done by community volunteers.

What is United Way of the Ozarks? United Way of the Ozarks is a local non-profit organization that has supported health and human service programs in our community since 1930, when a group of committed people built upon the familiar spirit of giving by many for one goal. Today United Way's 28-member board and 2000+ volunteers help people by raising money and resources to invest in programs that provide solutions for critical community issues as identified by the Community Focus Report

- **Why give through United Way? United Way is the source of the largest sum of private, unrestricted and constant funds to Ozarks area nonprofit organizations**
 - **We're local** - funds raised in the area stay here to address local problems.
 - **We're efficient** - volunteers help conduct the campaign to keep costs low.
 - **We're effective** - by bringing the community together, we accomplish more than we can alone.

- **It's easy** - payroll deductions make giving simple.
- **We're accountable** - volunteers determine the funding investments

How much of my gift goes to program support? United Way administrative costs are low – only 10-12%. That means that 88-90 cents of every dollar donated to United Way goes for program, initiative and collaborative support in our community.

Why do agencies fundraise if they receive money from United Way? United Way money is designated to support programs, initiatives and collaboratives. Agencies raise money to supplement programs and to help cover administrative and operating costs such as building and maintenance.

Who runs United Way of the Ozarks? Community volunteers from all walks of life run United Way of the Ozarks. Their roles vary. The members of the Board of Directors establish and monitor policy. However, hundreds of volunteers help orchestrate volunteer projects and special events; they visit agencies, and through the Community Investment process review their budgets; and review and evaluate funded programs positive outcomes before making funding recommendations.

Do United Way agencies charge fees for services? Some do and some don't. Those that do charge a fee base it on the individual's ability to pay. If an individual is unable to pay, no charge is made. Your generous pledge means that services are available to all who need them.

What percent of an agency's budget is covered by United Way? Each agency requests a specific amount of money. The request is based on need and evaluated through the Community Investment process. Each agency receives a different amount, and therefore the percentages vary.

If I donate, will my name and address be sold to others? Absolutely not! United Way of the Ozarks honors the confidentiality of information and the privacy of our donors and beneficiaries.

If I need services, where can I get help? Call United Way Missouri 211 for a referral for help. You can also visit the United Way website: www.uwozarks.com for a list of member agencies.

What makes United Way so effective? Few organizations are as effective with your contributions as United Way. By working closely with business, labor, government and human service organizations, your United Way is uniquely positioned to have the greatest possible impact on our community's most pressing needs. Your dollars, your volunteer hours and your best ideas are combined and focused to make our community stronger and safer and create lasting changes.

What does United Way of the Ozarks do besides raise money? The United Way of the Ozarks works closely with service providers, city, county and state government to identify health and human service problems in our community and develop plans to address those problems. United Way also assists nonprofit agencies in recruiting and training volunteers and provides volunteer resources in the area of management and technical assistance, training and board leadership. In addition, United Way helps create collaborative partnerships to improve the community's capacity to solve problems.

What is United Way Worldwide? United Way is a worldwide network in 45 countries and territories, including nearly 1,300 local organizations in the U.S. It advances the common good, creating opportunities for a better life for all, by focusing on the three key building blocks of education, income and health. The United Way movement creates long lasting community change by addressing the underlying causes of problems that prevent progress in these areas. **LIVE UNITED** is a call to action for everyone to become a part of the change.

How is the United Way of the Ozarks related to the United Way Worldwide and other United Ways across the country? Our United Way is independent of United Way Worldwide and other 1300+ local United Ways. Our organization is governed by our local volunteers--decisions made by other United Ways have no impact on decisions made in the Ozarks. Each year, United Way of the Ozarks spends less than one percent of its campaign total on various services from the United Way Worldwide.



LIVE UNITED® GIVE. ADVOCATE. VOLUNTEER.

10 Reasons to Donate to United Way of the Ozarks

1. **GIVE WHERE YOU LIVE...**All your money stays right here in your community.
2. **GIVE TO ONE – INFLUENCE THE CONDITION OF ALL.** One gift helps many, 224,000 in 2010. Your donation supports 40 individual programs in United Way's 23 partner agencies and 8 initiatives.
3. **CONSISTENCY.** Your United Way gift can change lives; Year after year, your gift puts food on the table, provides a safe place for kids, or teaches someone to read.
4. **LOCAL DECISIONS.** United Way Volunteer donors work together to make the funding decisions.
5. **YOU MAKE A DIFFERENCE.** Your contribution combined with others, provides a big impact on the quality of life in our community.
6. **IT'S EASY!** Your donation comes from a payroll deduction and is spread throughout the year.
7. **IT'S BIG PICTURE.** Now, more than ever, we have family and friends who are facing job, food, and housing challenges they have never had to face...United Way supports agencies that focus on our critical issues.
8. **ACCOUNTABILITY.** United Way of the Ozarks reviews each year the financial stability of our partner agencies; you can give with confidence that your donation is being used for the greatest impact.
9. **DELIVERS RESULTS.** Your United Way donation goes to partner agencies to create long-lasting change and measurable results in critical issue areas facing our area.
10. **IT'S A WIN-WIN!** With all of us working together, we create a brighter future for all.



LIVE UNITED® GIVE. ADVOCATE. VOLUNTEER.

What does it mean to **LIVE UNITED?**

Underneath everything we are, underneath everything we do, we all are all people. Connected, interdependent, united. And when we reach out a hand to one, we influence the condition of all. That's what it means to **LIVE UNITED**.

- It takes everyone in the community working together to create a brighter future.
- Together, we can accomplish more than any single group can on its own.

GIVE. ADVOCATE. VOLUNTEER....

GIVE.

- Your contribution goes to work bringing lasting changes, right in Southwest Missouri.
- When you invest in our area, you make long lasting changes for family, friends and neighbors in our 14-county service area.

ADVOCATE.

- You can make change happen with your voice. Get informed. Tell your friends about the critical issues that face our region.
- Choose to **LIVE UNITED** by speaking up for issue you are passionate about. Champion a cause, tell your friends, write a letter, be visible and engage decision makers and policy leaders to help address our most important community/area needs.

VOLUNTEER.

- Community volunteers give of their time and talents to work to influence the conditions in our community and region.
- Volunteering is a great way to contribute to the overall well-being of our area. You have the chance to make friends, learn new skills and most importantly, share your talents and expertise with others. Give whatever time you have. **LIVE UNITED** by giving back one of the most valuable gifts – your time.

LIVE UNITED...