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Campaign Toolkit

In this section you have access to all of the materials you will need to run a successful workplace campaign. Please contact your United Way representative or e-mail us at unitedway@nsatel.net with any questions.

Employer Campaign Guide - Frequently Asked Questions

Why is my organization asking me to make a charitable donation?

While the philanthropic mission of organizations may vary, there is much that they have in common. Each has a deep commitment to its community and believes that real change can happen if the community comes together to focus on the most pressing problems. An integral part of that commitment to community is involving employees in their efforts by providing the opportunity to become part of the fabric of change.

Why give to Caring Rivers United Way?

When you give to CRUW, you maximize the only return on your charitable dollar that matters—results. CRUW's strategic plan is focused on change and making the most impact on our communities. We focus on meeting basic community needs, promoting health and wellness, and nurturing children and families. Our expertise and partner-ships with public, private, and non-profit sectors make CRUW the most effective means of making a difference in our communities.

Can I specify which non-profit agency receives my pledge?

Absolutely. Giving is a personal decision and that is why we accept designations made to local non-profit agencies. You can also designate your pledge to CRUW which is a key source of support for our community agencies.

Can I designate to a non-profit outside of the CRUW service area?

Yes. CRUW will forward your designation to that non-profit.

How much of my pledge goes directly to providing services to people in need?

Eighty-nine cents out of every dollar you give goes directly to providing services to people in need in Big Lake, Santiago, Elk River, Otsego, Zimmerman, and Princeton. In addition to services funded by United Way, your funding also goes to ensuring quality, training, coordination, and efficiency.

Does CRUW have an active, responsible, and voluntary governing body that ensures effective governance over the policies and financial resources of the organization?

Yes, CRUW has a volunteer board of directors that oversees the organization. CRUW also has the following standing committees: Executive Committee, Finance Committee, Campaign Committee, Public Relations Committee, and the Community Impact Committee. All of these committees are responsible for reviewing and reporting activities of the organization to the board.

How many board members does CRUW have? What are the criteria for being on the board?

CRUW presently has thirteen elected board members from a cross section of our service area. They represent public, private and non-profit sectors as well as the retired population. Board members serve for a minimum of 3 years but are eligible for re-election on a year by year basis up to a total of 6 consecutive years. The Board typically meets on a monthly basis.

How does CRUW ensure that board members do not have a conflict of interest relating to business decisions that must be made by the Board?

Volunteers review CRUW's Code of Ethics and ensure that they adhere to the spirit of the Code when making policy or otherwise managing the affairs of the organization. In the event that there comes before the Board of Directors a matter for consideration that raises a potential conflict of interest for any member of the board, the member shall disclose the potential conflict of interest as soon as he/she becomes aware of it. In this circumstance, the volunteer will not participate during discussion (except to provide factual information), review or vote in connection with the matter.

Does CRUW pay dues to the United Way of America? What are the benefits of membership?

Yes, CRUW pays dues to United Way of America. United Way of America provides the following services to its independent and autonomous dues paying members: gathers collective information to show the impact of United Way's work on communities; ensures consistent assessment of local operations; generates accurate comparisons of operating standards and expenses; provides technical assistance, advice, and counsel; and identifies leaders and recognizes best practices among and for its members.

What is Community Impact?

Community Impact is a multi-tiered strategy aimed at strengthening the CRUW service area communities and improving the quality of human services by focusing on three key areas that pose the most pressing problems:

Community Basic Needs: assuring community members are able to access assistance to meet basic needs.

Promoting Health & Wellness: assuring community members are able to access assistance to achieve their highest attainable level of well-being and independence.

Nurturing Children & Families: assuring community members are able to access assistance to reduce risks and promote strengths of children, youth, and families.

How does CRUW measure results and how reliable is the information?

CRUW requires funded agencies to provide financial audits and to report on all program outcomes each year. Agencies must identify which CRUW goal and objectives are supported with their allocation, and report the numbers served from the allocation.

How does CRUW monitor the agencies that receive funding?

Funded agencies are held to high standards for performance and accountability. Annually, funded agencies are required to submit financial statements for review. There are CRUW criteria that must be demonstrated.

In addition to funding, what other kinds of support does United Way give to the community?

CRUW holds an annual Community Forum where important community needs are focused on. Plus CRUW funds a Youth United project in partnership with the Elk River YMCA where youth volunteerism is promoted by having youth who typically fall through the cracks become an integral part of a United Way funded-agency project. The youth are recognized for their efforts and the agency benefits from their work.

CRUW staff are also involved in volunteering for Chamber activities.

How does CRUW respond to complaints from the community about agencies that it funds?

The CRUW staff and Board of Directors work closely with a Community Investment Committee to determine levels of funding and to review agency performance. Any complaints would be handled quickly and effectively by the Executive Committee of the Board of Directors.

What are the minimum standards for a non-profit organization to become a funded agency?

Eligibility requirements:

1. Must have acceptable legal status as:
a nonprofit charitable organization; or
a government agency; or
an agency with a qualified fiscal agent
2. Must complete required application forms and submit on time.
3. Must complete required reporting forms accurately and on time.
4. Must have a representative volunteer governing board and list of the board of directors to be provided to CRUW.
5. Present evidence that the agency has a record of sound management and community service covering a reasonable length of time.
6. Demonstrate an understanding of community needs in the CRUW service area and the services currently being provided in order to avoid duplication of services.
7. Conform to the requirement of any governmental body, which regulates activities in its field of service.
8. Have a non-discrimination policy on file with CRUW.
9. Must demonstrate a need for funding from CRUW.
10. Must include the most recent 990 form with application (if applicable).
11. The agency must provide CRUW with an operating budget approved by the agency's board of directors.
12. Funded agencies will maintain a collaborative relationship with CRUW.

Does the CRUW Board of Directors approve the annual budget?

Yes, at the June board meeting the budget for the new fiscal year (July 1 to June 30) is reviewed and voted on.

Does CRUW comply with generally accepted accounting principles and have an annual audit conducted by an independent certified public accountant whose examination complies with generally accepted auditing standards? Is this report generally available?

CRUW works with Schlenner Wenner of St. Cloud (independent auditors) on an annual audit. Schlenner Wenner annually reports results to the Board of Directors for review and approval and recommends actions in response to any management letter comments made. The IRS Form 990 (CRUW's tax return) prepared by our auditors and based on our audit is publicly available, either through gudestar.org or through a direct request to CRUW.

What is CRUW's annual budget?

The 2008-2009 budget is \$309,720 with \$130,000 allocated to agencies.

How often does CRUW pay out allocations to funded agencies?

Currently, allocations are paid out in two half payments. The first payment is made in August, the second is made in February of the following year. This allows us to ensure that the funding is available before we send out payment.

Do all donors receive tax receipts?

The IRS requires substantiation for all payments greater than \$250. These are mailed to companies and donors who meet these requirements.

Does CRUW promote itself as an equal opportunity employer?

Yes.

How does CRUW secure its computer systems?

User accounts are password protected and passwords are required to access all systems. Computer information is routinely backed up.

<Date>



To: <Prospective United Way Campaign Team Member>
From: <Your Name>
Re: Caring Rivers United Way Campaign

As a Caring Rivers United Way Campaign Team Member representing <insert your Department/Site Name here>, I am writing to you today in order to gain your assistance with our company's Employee Campaigning effort.

As a Campaigner, you play a pivotal role in helping our organization reach its campaign goals. As an individual, a community leader, you educate our fellow employees about the outstanding health and human service programs that United Way supports.

In order to carry out this responsibility, it will be important that you attend a Campaign Team Meeting on <insert date> at <insert location>. During this key session, you will receive the training and printed materials necessary to assist you in your campaigning efforts. When undertaking a Campaign of this nature, individual follow-up is a must. If necessary, please recruit additional volunteers within your department to assist you in this effort.

Please contact me to confirm your attendance at the Campaign Team meeting at your earliest convenience. With your dedication and enthusiasm, I am confident that <company name> can achieve its philanthropic commitment to Caring Rivers United Way and the communities in which we live.

Thank you for your support. Please don't hesitate to contact me if you have any questions.

Sincerely,

<Name>
<Title>

<Date>



Dear <Employee>

As we begin our Caring Rivers United Way (CRUW) campaign, I would like to take a moment to encourage your support. My motivations are both personal and professional. I take comfort in knowing that United Way touches so many people throughout our community- our families, friends and co-workers, as well as our customers and their families.

I also know that with United Way in my portfolio, my investment continuously multiplies, and the results could not be better. In 2009, 34 local agencies and programs are being supported by CRUW. That's not surprising when you consider the comprehensive range of health and social services addressed by CRUW. We all care about issues like hunger, childcare, strengthening families, and increasing independence for our elderly neighbors. A United Way investment is a great way to be part of the solution.

Last year, we raised <\$> in our United Way campaign, company-wide. CRUW puts those dollars to work-efficiently and effectively-investing in our communities. Because trained volunteers are such an integral part of the system, CRUW is able to keep operating costs low.

I am proud of our accomplishments and the impact we have made. Our support taps into the passions and strengths of our communities, creating an environment where people come together every day to make our region a better place for all of us to live. I hope you will join me to help us build a better, stronger and more caring community by contributing to Caring Rivers United Way.

Thank you.

<CEO Name>

<Title>

<Date>



Dear <Name>:

Congratulations on your new job! From all of us at Caring Rivers United Way, we hope this next step in your career is both personally and professionally rewarding.

You've joined an organization that's committed to making a difference in the community, which is why your company strongly supports Caring Rivers United Way (CRUW). Our work is bringing people and community resources together to address the most pressing issues we face today. No other local organization has the reach and capacity to provide crucial funding and operational support to nonprofit agencies across the service area. Combined with our efforts in public awareness and partnership with public and private institutions, CRUW is targeting the root causes of social issues to effect real and lasting change.

Your contribution to CRUW will touch the lives of so many by providing for basic needs, assuring community members are able to access assistance to achieve their highest attainable level of well-being and independence, and encouraging the positive development of our children and youth. Together, we can help people throughout the region achieve their full potential and lead healthy, productive lives.

Just five minutes of your time can change lives. Please complete the enclosed pledge form to invest in the lives of children, youth and their families. If you participated in workplace giving at your previous place of employment, please note that your past pledge does not automatically continue with your new employer. You must complete the enclosed pledge form to continue giving. Also know that you can designate that your investment goes to your zip code area.

Remember that you can also increase the impact you make in people's lives by becoming a volunteer. For more details, please visit our web site at www.caringrivers.org.

Thank You!

<Date>



Dear <Retiree>,

As part of this great community, we as individuals—and collectively as an organization—share a responsibility to safeguard the strength and stability of our society. By exercising compassion for our neighbors, we will build a foundation for prosperity while inspiring others to stand up and make a difference.

This is why I give to Caring Rivers United Way (CRUW), based in Elk River, MN. Its work is bringing people and community resources together to address the most pressing issues we face today. No other local organization has the reach and capacity to provide crucial funding and operational support in our area. Combined with its efforts in public awareness and partnership with public and private institutions, CRUW is targeting the root causes of social issues to effect real and lasting change.

Your contribution to CRUW touches the lives of so many by providing for basic needs, assuring community members are able to access assistance to achieve their highest attainable level of well-being and independence, and encouraging the positive development of our children and youth. Together, we can help build stronger communities.

Thank you for your time. I believe strongly in our commitment to the community, and I hope you will also get involved in our mission to make a difference by giving to Caring Rivers United Way. You can also visit www.caringrivers.org or contact our campaign manager to learn how to get involved as a volunteer.

Sincerely,

<Name>

<Title>

<Date>



Dear <Prospective Leader>:

On the eve of the Caring Rivers United Way (CRUW) campaign at <Company name>, I am asking you to consider making a Leadership Gift of \$1,000 or more. Gifts at this level are vital to CRUW's success, and are one way that you can demonstrate your personal commitment to helping our community thrive.

As a long-time supporter of the United Way, I have seen first hand the effectiveness of this organization and its proven ability to help the community as a whole by providing leadership in getting at the root causes of community needs. It serves as a vehicle for each of us to personally make a difference in the lives of many people--children, the elderly, the poor, those down on their luck working to turn their lives around.

A Leadership Gift sends a clear message to the community-at-large. It underscores the organization's firm commitment to helping children, seniors, persons with disabilities, and families improve their lives...

Thank you for considering my request.

Sincerely,

<CEO's Name (or other company leader)>

<Title>

Stay involved and monitor the campaign process and results.

Assigned To:

Completion Date:

Putting the Plan into Action

- Conduct Campaigners' training session.
- Schedule video, agency speaker, and time with your United Way representative to answer questions
- Display campaign activities and information in prominent locations
- Send CEO endorsement letter
- Conduct leadership and employee meetings (include CEO)
- Conduct kickoff event (include CEO)
- Conduct activities, special event fundraisers, etc.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Wrapping up the Campaign

- Collect ALL pledge forms and check for completeness (calculations, date, signature, etc.)
- Sort forms or date by payment type: cash, checks, payroll deductions, credit cards, bill at home requests, or securities
- Notify CRUW of results. Submit forms or electronic transfer to CRUW for processing. Give copy to Payroll. Attach cash/checks to forms or issue company check
- At closing ceremony or through memo or letter:
 - Thank and reward employees
 - Recognize and reward campaigners
 - Thank committee
 - Publicize corporate/ employee results
 - Distribute incentives and publicize winners
- Conduct a campaign review session and note outcome
- Organize your materials for next year's campaign team

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

- **Congratulate yourself for improving the quality of life in our community!**

Caring Rivers United Way Campaign

Employee Campaign Meeting Agenda

<u>Topic</u>	<u>Speaker</u>	<u>Time</u>
Welcome and Introductions	Employee Campaign Chair Or Campaign Team Member/s	2 min
CRUW (Importance of United Way in Community)	Employee Campaign Chair, CEO or designee	3 min
United Way Presentation (Video, speaker, etc.)	Agency representative or United Way representative or volunteer	10 min
Campaign Logistics (Procedures, Incentives, Timeframe)	Employee Campaign Chair or designee	5 min
Questions and Answers	Employee Campaign Chair or United Way representative	5 min

Total Time
30 minutes



Caring Rivers United Way Campaign

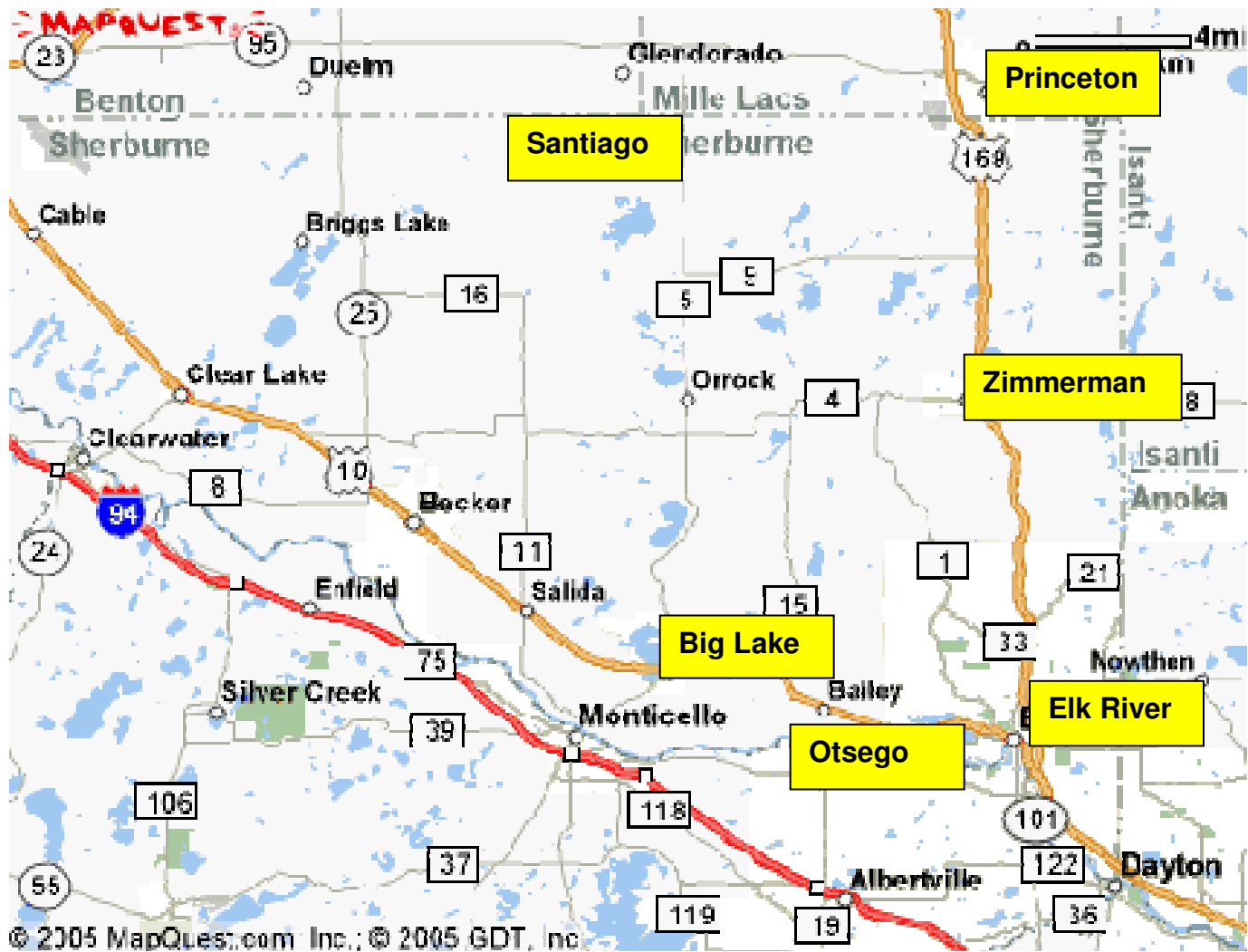
Employee Campaign Meeting Agenda

<u>Topic</u>	<u>Speaker</u>	<u>Time</u>
Welcome and Introductions	Employee Campaign Chair or Campaign Team Member/s	5 min
CRUW Endorsement (Importance of United Way in Community)	Employee Campaign Chair, CEO or designee	5 min
United Way Presentation (Video, speaker, etc.)	Agency representative or United Way representative or volunteer	15 min
Review United Way Materials	Employee Campaign Chair or United Way representative	10 min
Campaign Video		5 min
Campaign Logistics (Procedures, Incentives, Timeframe)	Employee Campaign Chair or designee	10 min
Questions and Answers	Employee Campaign Chair or United Way representative	10 min

Total Time
60 minutes



Caring Rivers United Way Service Area



Workplace Frequently Asked Questions

Where does the money go?

Approximately three-fourths of the funds raised from individual and company donors are directed to Caring Rivers United Way which along with their Community Investment Committee decide on strategic investments in helping to meet basic community needs, in helping to assure that community members are able to access assistance to achieve their highest attainable level of well-being and independence, and in helping to strengthen children, youth and families. The other one-fourth of funds raised are directed by donors to individual agencies of their choice.

I get asked for money from so many organizations. Why should I give to Caring Rivers United Way...what makes them different from other non-profits?

There are many reasons to choose Caring Rivers United Way (CRUW) for your charitable contributions:

- Our experience in the area—we have been helping businesses and donors with their philanthropy since 1969—all dollars used locally.
- With a single gift to CRUW, you support a broad range of services addressing the needs of the whole family, from preschool children to the elderly.
- CRUW selects highly effective agencies to fund, holding them accountable for results.
- When donors pool their money through CRUW, they not only provide stability for a network of effective agencies, but also help to attract national funding to the community.
- CRUW listens to the community and partners with local private and non-profit sectors to make a difference for our communities.
-

I am personally involved with a particular organization. Why shouldn't I just send my money directly to them instead of paying CRUW's overhead charges?

CRUW's value add to the donor does not lie simply in the passing through of funds. If you faithfully pledge to your respective charity every year and ensure that your payment is made, CRUW would not bring additional value to that distinct relationship. Our value lies in the solicitation and facilitation process for those donors who may not always remember or take the time to ensure their annual contribution is made—our value add is to ensure that this funding continues to get into the community consistently every year for continued support of those agencies. Also, because of the convenience of payroll deduction, giving through CRUW makes it easier for donors to give a sizeable gift.

How can the organization I am involved with get money through CRUW's Donor Choice Program?

Simply making a pledge and writing an agency's name on the form will kick off the eligibility process. It is important to note that this agency must be:

- a nonprofit charitable organization (501c3 tax status), or
- a government agency, or
- an agency with a qualified fiscal agent

Why hasn't the agency I designated my gift to last fall been paid yet?

Donors generally make their pledges in the fall, but their gift is deducted out of their paychecks over the course of the year. These deductions are remitted to CRUW by the donor's employer in intervals. Final payments may be made 15 or more months after the pledge was made. CRUW can only pay out these funds as they are received. Our policy is to cut checks for designations in December of the following year.

Wasn't there some kind of scandal associated with United Way a few years ago?

In 2003, the United Way of the National Capital Area and in 1992 at United Way of America, there were incidents. Our volunteer-driven United Way was not involved in them in any way and we continually examine our own practices and maintain the highest standards of accountability.

***What your investments
CAN DO...***
Through Caring Rivers United Way:

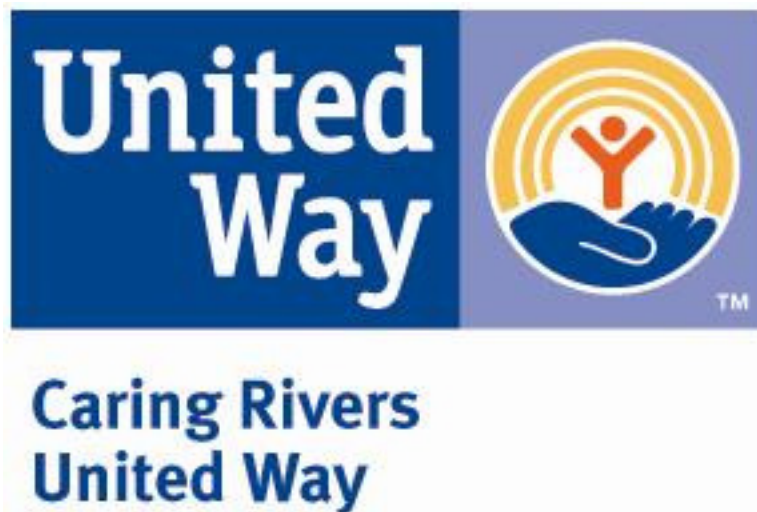
\$25.00 per pay period-*the cost of buying a magazine subscription*- will provide one senior the support they need to remain independent in their home.

\$15.00 per pay period-*the cost of ordering a pizza*- will provide a youth with a mentor.

\$10.00 per pay period-*the cost of going to a movie*- will provide after school and summer programs for a child.

\$5.00 per pay period-*the cost of a fast food meal*- will provide seven people with supplemental food for a year.

\$1.00 per pay period-*the cost of a bottle of soda*- will provide an uninsured or underinsured child with immunizations.



Together we do what matters...

United Way is about the business of improving lives. We collaborate with people who want to make a difference, connect them to other committed partners and connect their combined resources to critical issues so that together, we can create lasting changes in our communities.

Sample Email Reminder to Send Out Mid-Campaign (From CEO or Campaign Leader)

Suggested Subject Line: Friendly Reminder: Caring Rivers United Way Needs You!

Dear Friends,

We kicked off the <CORP NAME>/Caring Rivers United Way Campaign on <DATE> and I would like to thank all of you who have already joined us in support of those in need in our community.

I hope that you have had a chance to review the materials and visit CRUW's website (www.caringivers.org) to learn more about how United Way works and how your gift helps create change.

Our campaign ends on <DATE>. I encourage you to make a gift today. If you have any questions about our campaign, please contact me. Thank you for your time and your generosity.

Sincerely,

<NAME>
<TITLE>

Five Days of Thank You E-mail

- 1. Thank you for investing in what matters, United Way.***
- 2. It is a wonderful chain reaction when you choose to invest in your community. Thank you for your support!***
- 3. Thank you for your investment in a better community for everyone.***
- 4. Thank you! Your investment will have measurable results in our community.***
- 5. Thank you for your gift, from your friends, co-workers, neighbors, community, and Caring Rivers United Way.***

E-mail and Voicemail Messages

- Caring Rivers United Way's mission is to enhance the community's organized capacity of people to care for one another. We focus on providing essential health and human services to children, youth, and adults and supporting safe and thriving communities and neighborhoods. Please support Caring Rivers United Way; by doing so you help bring services to our neighbor who might otherwise be left alone or forgotten.
- Caring Rivers United Way (CRUW) funds a continuum of services that address the needs of the entire family. By giving to CRUW, you can continue to make a difference on issues you care about while knowing that you're helping all of your neighbors. CRUW pools your gift with those of other donors, leveraging these funds to achieve greater impact within our community.
- By giving to Caring Rivers United Way (CRUW), you ensure that thousands of people from neighborhoods throughout our region receive the support and assistance they need to lead safe, healthy, and rewarding lives. CRUW researches the issues and provides the necessary vision and leadership to address the most pressing needs in our community. CRUW invests your contribution through a thoughtful, effective plan for making sure that our community, families, and individuals are safe, healthy and able to reach their full potential.
- Caring Rivers United Way (CRUW) focuses on measurable strategies for getting to the root causes of problems, preventing them before they start, and giving people more options for the future. By giving to CRUW, you make our community a better place to live, raise a family, grow older, and participate in community life.

What and Who We Fund

Our Focus Areas:

Meeting Basic Community Needs: assuring community members are able to access assistance to meet basic needs. In this area we fund programs and agencies that focus on providing services such as: food, clothing, safe shelter, assistance in crisis, and other such needs.

Promoting Health & Wellness: assuring community members are able to access assistance to achieve their highest attainable level of well-being and independence. In this area we fund programs and agencies that focus on providing services such as: promoting health to all, including developmental delays and/or disabilities, mental health, substance abuse, healthy choices, preventions, medical care and other such needs.

Nurturing Children & Families: assuring community members are able to access assistance to reduce risks and promote strengths of children, youth and families. In this area we fund programs and agencies that focus on providing services such as: learning development, mentoring, healthy activities and other such needs.

A full list of funded agencies/programs is in the Caring Rivers United Way brochure and on the website.

Please note: the following information is only necessary for individuals who itemize their deductions on their federal tax return, NOT those who take the standard deduction.

Caring Rivers United Way (CRUW) is committed to providing the information our donors need to make informed decisions regarding their charitable contributions. We want to make sure that all of our individual donors and corporate partners are aware of the new tax laws that went into effect in late 2006*, **which affect charitable gift substantiation.**

NEW IRS REQUIREMENTS FOR CHARITABLE GIFT SUBSTANTIATION:

- **Individuals who itemize their deductions on their federal tax return must have documentation that substantiates *all* contributions, regardless of amount.** (The previous law only required substantiation for contributions of \$250 and above.)

- **Substantiation must include the following, based upon the donor's payment type:**
Gifts of check, credit card or cash: Donors need to retain a bank record (cancelled check or bank statement), credit card statement OR obtain written acknowledgement from the charitable organization showing the name of the charity, date of payment and amount of contribution. In the spring of the year, Caring Rivers United Way provides tax receipts to all donors who made pledges to CRUW over \$250 in the prior calendar year.

Gifts of securities or property: Donors need to retain a broker record showing the name of the charity and the date of the gift OR obtain written acknowledgement from the charitable organization showing the date and the exact type of contribution (e.g.: 5 shares of ABC stock.).

Gifts of payroll deduction: Donors need to retain the following TWO documents: 1) a pay stub, W-2 OR other document furnished by the employer that indicates the amount withheld during the tax year for payment to a charitable organization; AND 2) a copy of the pledge confirmation letter from CRUW.

Under the new law, **continuous/rollover givers** must provide the same documentation as other tax payers to substantiate donations for tax purposes (#1 and #2 above).

- CRUW sends a letter to every donor (\$250 and above) acknowledging and thanking them for their pledge. **This pledge confirmation letter must be kept by donors to substantiate their pledge.**

Important Reminder to Donors: Caring Rivers United Way is not a tax advisor. As with any financial recommendation, please contact your accountant or tax advisor to determine the income tax impact of your donation to CRUW.

* **Background:** In August of 2006, the Pension Protection Act was passed into law. This law includes a number of provisions that are specifically targeted at the non-profit sector, the most relevant of which are outlined above.

<Date>

Dear <Donor>:

Thank you! Your <renewed> membership in Caring Rivers United Way's annual campaign shows just how much you care. When combined with the generosity of our colleagues, it is clear that <Company Name> is one that cares about the health and well being of the communities in which our families, friends, co-workers, and our customers live and work.

Please accept my appreciation for helping build our reputation as a good corporate citizen.

Thank you,

<CEO's Name (or other company leader)>

<Title>



Thanks <CORP NAME>, For Caring!

<Date>

Dear Friends,

Our annual <CORP NAME>/Caring Rivers United Way Campaign has come to a close, and I would like to take a moment to thank you for your generosity.

I think most of us agree that just feeling good about our charitable contributions isn't enough anymore – we want to see change and our community needs results. <CORP NAME> believes that Caring Rivers United Way is delivering precisely the kind of results that lead to lasting, systemic change.

Although the campaign is over, that shouldn't mean that you forget about Caring Rivers until next year. Consider being a volunteer with Caring Rivers; there are many opportunities to do so. Visit www.caringrivers.org.

Thank you for giving. I am proud to be a part of a company that gives back so generously to this amazing community.

Regards,

<NAME>

<TITLE >