

ADVANCING EDUCATION  
INCOME AND HEALTH

STUDENT UNITED WAY  
**OFFICIAL**  
**GUIDEBOOK**

FOR HIGH SCHOOL, COLLEGE AND UNIVERSITY CAMPUSES

GIVE. ADVOCATE. VOLUNTEER.

[UnitedWay.org/student](https://UnitedWay.org/student)

LIVE UNITED



# INTRODUCTION

In 1887, a Denver woman, a priest, two ministers and a rabbi recognized the need for cooperative action to address their city's welfare problems. The group put their heads together to plan the first united campaign for 10 health and welfare agencies. They created an organization to serve as an agent to collect funds for local charities, as well as to coordinate relief services, counsel and refer clients to cooperating agencies, and make emergency assistance grants in cases that could not be referred. That year, Denver raised \$21,700 and created a movement that would spread throughout the country to become the United Way.

The meeting in Denver and the birth of the United Way concept were more than 125 years ago. Today United Way is still dedicated to creating a world where all individuals and families achieve their human potential through quality education, financial stability and good health. We realize we can't do it alone. In recent years, United Way has encouraged students to LIVE UNITED by creating Student United Ways on college and university campuses. In our 125 year history, United Way has always worked to engage diverse groups of people in addressing the issues in our local communities. Many of the 1,800 local United Way organizations around the world have worked with students in various ways throughout their history, but Student United Way is the first and only system-wide effort to engage students in giving, advocating and volunteering to advance the common good.

We want to make sure you as a leader on campus can also be an effective leader for your community. This resource guide is a great starting place to ensure that takes place. The information you'll find in these pages was obtained through careful research, piloted tools and resources, and many lessons learned from years of experience with student-led United Way clubs.

Please know that United Way, both at the local level and at United Way Worldwide, has a vested interest in your success. It is going to take all of us working together as one to address the education, income and health issues in our communities and around the world. Every Student United Way member could be the difference between a high school graduate and a high school dropout, between a financially secure family and a family that struggles to make ends meet, or between an individual in good health and one who is not. If you have questions, problems, or concerns during your journey, feel free to reach out to us so we can better support you in this work. We're here to help!

With heartfelt thanks,

Your Friends at United Way Worldwide  
Student@UnitedWay.org

# Syllabus (Table of Contents)

## Student United Way 101 – Introduction to Student United Way

Overview of Student United Way..... 4

Roles and Responsibilities..... 7

Requirements for Being a Student United Way..... 8

Ten Steps to Starting a Club..... 11

## Student United Way 201 – Management Principles of Student United Way

Planning..... 14

Recruitment..... 16

Retention..... 17

Communications..... 20

## Student United Way 301 – Basic Programing for Student United Way

Selecting Opportunities for Involvement..... 25

Developing Budgets..... 25

Funding..... 26

Evaluation and Reflection..... 27

## Student United Way 401 – Connecting to the Network

Student Leadership Retreat..... 28

Alternative Spring Break..... 28

Student United Way Awards..... 28

Day of Action..... 29

Support and Acknowledgements..... 30

Read more at [unitedway.org/student](http://unitedway.org/student)

# SUW101 – Introduction to Student United Way

## Overview of Student United Way

Student United Way is a campus-based community change organization, led by students, that addresses critical education, income and health issues in their communities. Every Student United Way chapter is a



partnership between the local United Way; the high school, college or university campus; and the community at large. As such, each Student United Way will be reflective of those three entities in everything from their marketing materials to the projects they choose to coordinate. Student United Ways must be officially recognized organizations on their campus as well as follow the registration and minimal annual reporting requirements with United Way Worldwide. Of course, clubs must ensure they follow the rules and regulations set forth by their campus and United Way while living up to the highest ethical standards at all times.

Despite the uniqueness of each chapter, Student United Way members should know that they are part of an international network of young people working to advance the common good. It is an opportunity for students to engage in something bigger than self. It is a chance to think globally while acting locally to better the lives of friends, neighbors, and other members of their community.

The primary function of Student United Way is to offer students a meaningful way to engage in United Way's mission and vision for the future. In 2008, United Way launched bold goals to improve the lives of Americans and create lasting change in our communities. Meeting these goals will address critical issues in **education, income and health** – the building blocks of a good life. The goals are:

- Cut the number of high school dropouts – 1.2 million students, every year – in half.
- Help people achieve financial stability, and get 1.9 million working families – half the number of low-wage families who are financially unstable – on the road to economic independence.
- Increase by one-third – 31.1 million people – the number of youth and adults who are healthy and avoiding risky behaviors

To support these bold goals in education, income and health, United Way launched the LIVE UNITED campaign – a call to action that emphasizes our interconnectedness and the need for everyone to be a part of the solutions to our world's issues. United Way is bringing the LIVE UNITED credo to life by providing real opportunities for people to give, advocate and volunteer to help others, improve our communities, and advance the common good.

“Each person must live their life as a model for others.”

-Rosa Parks

# ISSUES AND INDICATORS AT-A-GLANCE

## EDUCATION

HELPING CHILDREN AND YOUTH  
ACHIEVE THEIR POTENTIAL

**Target Issue: Readiness to  
achieve in school**

**Intended result:** Children enter school developmentally on track in terms of literacy and social, emotional and intellectual skills  
**Indicator:** *Percentage of 3- to 5-year-olds with 3 or 4 (of 4) school readiness skills*

**Target Issue: Academic  
achievement**

**Intended result:** Elementary students are prepared to succeed in later grades  
**Indicator:** *Percentage of fourth graders who are proficient readers*  
**Intended result:** Young people graduate from high school  
**Indicator:** *Percentage of public high school students who graduate on time*

**Target Issue: Productive and  
engaged youth**

**Intended result:** Young adults make a successful transition from high school to work life  
**Indicator:** *Percentage of 18- to 24-year-olds who are not working or in school*

## INCOME

PROMOTING FINANCIAL  
STABILITY AND INDEPENDENCE

**Target Issue: Achieving greater  
financial stability**

**Intended result:** Lower-income<sup>1</sup> working families move toward financial independence  
**Indicator:** *Percentage of lower-income working families that spend more than 40% of their income on housing*

**Target Issue: Increasing income**

**Intended result:** Working families increase their income  
**Indicator:** *Percentage of working families that are lower-income*

**Target Issue: Building savings**

**Intended result:** Lower-income working families have savings or checking accounts and money saved for emergencies  
**Indicator:** *Percentage of lower-income working families that have a checking or savings account with a minimum of \$300*

**Target Issue: Gaining and  
sustaining assets**

**Intended result:** Lower-income working families build appreciating assets  
**Indicator:** *Rate of homeownership for lower-income working families*

<sup>1</sup> family income less than 250% of the federal poverty level

## HEALTH

IMPROVING PEOPLE'S HEALTH

**Target Issue: Maternal health  
and infant well-being**

**Intended result:** Babies are born at low risk for preventable health problems  
**Indicator:** *Percentage of babies who are born low birthweight (5 pounds, 8 ounces or less)*

**Target Issue: Basic health care  
coverage and prevention**

**Intended result:** Children and youth receive timely, regular preventive health care  
**Indicator:** *Percentage of children under the age of 18 who are not covered by health care insurance*

**Target Issue: Healthy youth  
and adults**

**Intended result:** Youth and adults are healthy and avoid risky behaviors (for a definition of "healthy," refer to the table on page 12)  
**Indicators:** *Percentage of students grades 9–12 who are healthy and avoid risky behaviors; percentage of adults 18 and over who are healthy and avoid risky behaviors*

In short, Student United Way lets students take the lead in bettering their communities by giving, advocating and volunteering in the areas of education, income and health. Here are just a few examples of what giving, advocating and volunteering in your community might look like on the ground.

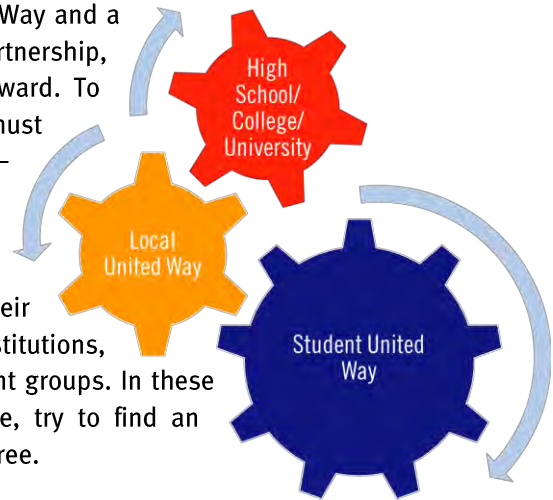
|           | GIVE   | ADVOCATE  | VOLUNTEER  |
|-----------|--|---|--|
| EDUCATION | Organize a book drive to provide children with books to prevent summer reading loss. Add a virtual component to accept credit card donations and purchase new books. | Host a movie night open to all students where you screen a documentary that highlights issues in the education system followed by a discussion led by a teacher or faculty member well-versed in the issue. | Create a reading buddy program where students read with children who are reading below grade level. Work with public schools or after school programs. |
| INCOME    | Work with RAs your or a nearby college's dorms all over campus to collect canned food from students moving out of the dorms right before summer begins.              | Create a marketing campaign about the Earned Income Tax Credit to help low-income families increase their disposable income.  | Provide financial education to children in public schools and teach them about vital skills like budgeting, opening a bank account and more.           |
| HEALTH    | Collect basic hygiene products (toothbrushes, toothpaste, soap, shampoo) for a population in need of these items.  | Host and promote a health fair where free services and educational information can be provided to a population that normally lacks access to care.  | Coach a youth fitness event to address childhood obesity and encourage kids to stay active.  |

The efforts of Student United Ways are producing huge results that benefit their communities in a number of ways. Each year, the Student United Way movement generates tens of thousands of hours of community service and raises thousands of dollars in cash and in-kind contributions. These resources can create long-lasting changes in the lives of those who need it most.

Student United Way members join out of a desire to better their community. While giving back is often the only benefit members care about, there are many personal benefits that should not be overlooked. Students involved with Student United Way gain valuable leadership and problem solving skills. For those interested in work in the non-profit sector, the experience of recruiting and managing volunteers, coordinating fundraisers and drives, and getting the word out about issues and events is invaluable. Those who do not wish to work in the non-profit sector can hone competencies necessary for a variety of career paths (sales, marketing, accounting) while working with a notable organization that Forbes magazine rated the 26<sup>th</sup> most valuable brand in the world in 2010 (the only nonprofit to make the list). The final added benefit is that Student United Way is just the first step to your United Way experience. Even after you graduate, if you move on from your home or college town, the community where you start your career will most likely have a United Way ready to help you continue advancing the common good while connecting with like-minded young professionals and community leaders.

## Roles and Responsibilities

Student United Way is a unique partnership between United Way and a high school, college or university. At the center of this partnership, student leaders act as the engine that drives progress forward. To guide and support student leaders, Student United Ways must have support from local United Way staff and campus staff – crucial gears that help the engine run smoothly and effectively. Student United Ways must identify a primary point of contact at the local United Way (United Way Advisor) and a high school, college or university employee to guide their activities on campus (Campus Advisor). At some academic institutions, faculty and staff are not allowed to act as advisors for student groups. In these instances, please inform United Way Worldwide. If possible, try to find an unofficial campus advisor that can fill that role to a certain degree.



The role of the student leader is to:

- Establish, grow, and manage the Student United Way
- Coordinate with local United Way and follow its policies and procedures
- Coordinate with host campus and follow its policies and procedures
- Ensure the club operates effectively and ethically in all activities
- Follow brand guidelines provided by United Way Worldwide
- Ensure annual reporting requirements are met
- Lead the club to make meaningful impact on your campus and in the community

The role of the United Way Advisor is to:

- Provide the student organization with a deep understanding of the community and the local United Way's work
- Train students in procedures or policies relevant to their work (money collection, branding, etc.)
- Connect students to meaningful opportunities while empowering them to choose the best use of club resources (i.e. - time & money)
- Help students plan an impactful year
- Disseminate resources sent from United Way Worldwide
- Connect them to staff in other departments – the relationship with Student United Way must be across the organization and not with a single staff person
- Be a resource and an advocate to ensure the club's success

The role of the Campus Advisor is to:

- Provide advising and guidance to help students navigate campus bureaucracy
- Assist students in planning and year-to-year transition of officers
- Inform students of resources that are available to them as an officially registered student organization
- Ensure they fulfill requirements to remain an active club on campus
- Be a resource and an advocate to ensure the club's success

The above guidelines are a very simple way to help delineate the general responsibilities of the three primary role-players. Each club will operate differently, and the time commitment and support needed from the United Way Advisor and Campus Advisor will vary. You can share this chart with a prospective campus or United Way advisor to further communicate the club's expectations.

| Role                      | Role Description   | Minimum Requirements   | Average Expectations  | Additional Best Practices   |
|---------------------------|--|--|---|---|
| <b>Student Leader</b>     | Primary decision-maker/manager of club and driving force behind ideation and execution of projects/programs                                  | <ul style="list-style-type: none"> <li>Lead, Facilitate, and Execute club's mission to achieve its vision</li> </ul>   |   |   |
| <b>United Way Advisor</b> | Local United Way staff person that links students to United Way and the community and helps ensure United Way Worldwide requirements are met | <ul style="list-style-type: none"> <li>Ensure club meets reporting requirements with United Way Worldwide</li> <li>Ensures club meets UWW brand regulations</li> </ul> | <ul style="list-style-type: none"> <li>Review and approve materials distributed by the club</li> <li>Host a retreat to onboard officers each year</li> <li>Provides training on basic policies and procedures for fundraising and volunteer management</li> </ul> | <ul style="list-style-type: none"> <li>Attend officer meetings</li> <li>Connect student leaders to United Way staff that can assist them with projects (eg – link student in charge of communications with VP of Marketing)</li> <li>Advocate for students to serve on UW committees</li> </ul> |
| <b>Campus Advisor</b>     | High school, college or university employee that provides guidance on campus, mentors officers, and helps ensure campus requirements are met | <ul style="list-style-type: none"> <li>Ensure club meets requirements necessary to remain active on campus</li> </ul>  | <ul style="list-style-type: none"> <li>Build continuity from year to year by helping with new officer training</li> <li>Connect club leaders to opportunities on campus that could increase membership or improve the outcome of planned activities</li> </ul>    | <ul style="list-style-type: none"> <li>Attend general membership and officer meetings</li> <li>Help with goal setting and planning of events and programs</li> <li>Open doors for students to connect with teachers, staff, faculty or administration to promote their results</li> </ul>       |

## Requirements for Being a Student United Way

There are five main requirements for being an official Student United Way. They are:

1. Student leadership and officer structure
2. Partner United Way endorsement and advisor
3. Host campus endorsement and advisor
4. Branding
5. United Way Worldwide registration and annual reporting

### Student leadership and officer structure

Student United Way clubs are student-led and student-organized. Student leaders develop the goals and plans for their club and pursue those goals through ideation, hard work, and dedication. As representatives of both their campus and United Way, Student United Way members adhere to their host campus' regulations and coordinate with their local United Way to work within their parameters as well.

Student leadership must be organized into a board or officer structure. The structure helps clarify roles, makes sure essential responsibilities are met, and makes decision-making easier. The exact structure, titles



and responsibilities are up to you, but operating a club without at least a president, treasurer and secretary can be difficult. A deeper view of officer positions and a suggested organization structure can be found online in the Resources section at [unitedway.org/student](http://unitedway.org/student).

### Partner United Way endorsement and advisor

Student United Way clubs must be endorsed and advised by their local United Way. This helps ensure the club's efforts will align with the mission and vision of the local United Way thus having a greater impact on the community. It also ensures United Way policies, procedures, brand guidelines and core values are being upheld at all times. With this endorsement, the United Way should provide a staff person to serve as the United Way advisor. How each club interacts with its local United Way will vary. Some clubs may only check in periodically, while others may have a relationship that involves almost daily communication. What matters most is that the local United Way is available to provide guidance to magnify the impact of student-led efforts.

### Host campus endorsement and advisor

A Student United Way must be an officially registered organization on campus. Student United Way clubs can exist at a high school, college, university, community college, or other higher education institution. Most campuses have their own set of rules and requirements around the founding and maintenance of student organizations. Achieving student organization status legitimizes the club on campus while often providing several benefits (student government funding, leadership training, access to facilities, etc.). With this endorsement, the host campus should also provide a faculty or staff advisor. This is typically a pre-existing requirement of student organizations, though not always.

### Branding

United Way is one of the most well-known nonprofits in the world. Working through the United Way movement will give you a recognized and respected voice in your community. Part of the reason the brand is so valuable is because across the country United Ways commit to using the logo and associated trademarks in a consistent way. The "LIVE UNITED Student United Way Brand Book" has all of the official brand guidelines. You can download a copy from the Resources section at [unitedway.org/student](http://unitedway.org/student).

One of the most crucial branding guidelines pertains to the LIVE UNITED shirt. Reproducing the LIVE UNITED shirt in your school colors is not acceptable. The only approved color scheme for a Student United Way LIVE UNITED shirt is a white shirt with black writing. The Brand Book does provide the appropriate ways in which Student United Ways can localize their shirts. You can also get creative by adding campus symbols and mascots on the back of shirts. Make sure to check with campus officials before using trademarked images.



### United Way Worldwide registration and annual reporting

Once you have established relationships with your United Way and campus, you must submit a registration form to United Way Worldwide. To obtain the form please check online at [unitedway.org/student](https://unitedway.org/student) or email [student@unitedway.org](mailto:student@unitedway.org). The registration form asks for basic contact information, background information on the club, and reiterates the importance of both the United Way and Student United Way adhering to brand guidelines.

At the beginning of every school year, United Way Worldwide will provide a brief survey to Student United Ways to help update contact information, have a better understanding of the activity level of registered clubs, and plan our resources accordingly. At the end of the year, Student United Ways must submit a brief year-end report detailing their activities. Receiving these two reports each year in a timely manner is crucial to United Way Worldwide's ability to promote the great work of students. If you do not comply with reporting requirements you may not be listed in the Student United Way directory, you will not be eligible for Student United Way awards, the accompanying prizes related to those awards or other system-wide opportunities made available by United Way Worldwide.

These requirements are in place to ensure Student United Ways are fully supported in their efforts, accountable for their actions while representing United Way, and have access to the resources needed to succeed. However, United Way Worldwide staff knows that each campus is unique. We also know that each local United Way is unique. If you are unable to meet a specific requirement due to the policies of your United Way or campus, please reach out to United Way Worldwide by emailing [student@unitedway.org](mailto:student@unitedway.org) so we can work toward a solution.





## Ten Steps to Starting a Student United Way

Okay, so now you have a strong sense of what United Way does, the nuts and bolts of a Student United Way and how it fits into the big picture – Give, Advocate, and Volunteer around key community issues in Education, Income, and Health – and how it does it – with the joint effort of a local United Way, a host campus, and by following a few key parameters. From here, you can follow these ten steps to start your own Student United Way.

### #1 Learn more about United Way and Student United Way

We've already covered the basics of United Way and Student United Way, but you may have more questions. Here are a few easy ways to learn more about United Way:

- Visit [www.unitedway.org](http://www.unitedway.org). For student-specific content, visit [unitedway.org/student](http://unitedway.org/student).
- Like the worldwide Student United Way Facebook Page ([facebook.com/studentuw](https://facebook.com/studentuw)).
- Contact United Way Worldwide directly by email at [student@unitedway.org](mailto:student@unitedway.org) for your initial questions and ongoing support. We can also connect you with a peer Student United Way to help answer questions.

### #2 Identify and contact your local United Way and ask them to endorse your efforts.

Your local United Way is an essential partner in your work. You can only start your Student United Way with their endorsement, and they will serve as vital advisors and key connectors to the rest of the community.

- Identify your local United Way here [www.unitedway.org/myuw](http://www.unitedway.org/myuw).
- If you don't already have a point of contact at your local United Way, reach out generally and ask for the best person to talk to about students getting involved. Sometimes the person is in a volunteer management, fundraising, or other positions.
- Some United Ways will know about Student United Way already, and some will not. If yours does not know about Student United Way, they can contact United Way Worldwide to learn more. You should also let them know the steps you have already taken to keep them informed of how they can assist.
- Be patient. United Ways often have lean staffing so staff members often are very busy. It may take a few tries to reach them. If you are having trouble, contact United Way Worldwide at [student@unitedway.org](mailto:student@unitedway.org) and we will help build the connection.

### #3 Research how to start a club on your campus and begin identifying a campus advisor.

The other essential partner in your work is your campus. You must be an officially registered student organization on campus.

- Most campuses have departments that cater to student clubs and associations (student life, student activities, student government, or similar entities). It may be in the form of an umbrella organization beneath which all the campus clubs are housed. This student organizations group will be a great resource for you. Reach out and learn more about what it will take to become an official club and what your campus has to offer in terms of support.
- Most campuses require a teacher, faculty or staff advisor in order for your group to gain student organization status. Additionally, advisors provide important insights into navigating the rules and procedures of campus, working with your peers and organizing the group, and connecting you with other campus resources. The advisor also helps bring consistency to your club as you experience officer turnover and attrition caused by graduation. The student life office and your local United Way may also be able to provide guidance on how to identify an advisor.
- Depending on the campus requirements, advisors can be dedicated staff people who advise full-time, or they can be faculty or other staff members who advise as an additional part of their job.

### #4 Recruit your friends and other future members.

To advance the common good and LIVE UNITED, we need everybody. Early on, it may be one or two other co-founders working to get your Student United Way off the ground. Starting small is fine, but always keep your eye out for potential new members!

- Start with a dedicated core group. From there you can grow a larger membership using outreach such as tabling, class presentations, etc.
- You will find recruitment ideas later in this guide. Feel free to contact us for the latest additional materials, as well.

### #5 Begin meeting regularly

Meetings are an opportunity to give updates and discuss plans, make decisions and divide out responsibilities, and to get to know each other and have fun.

- In the beginning, your meetings may be small and informal as you work to set-up Student United Way. It is still wise to take minutes and attendance. These records are useful to the club and can also document your professionalism when sharing with your United Way or campus advisor.
- Have a consistent meeting time and location so members can schedule around it. Have an agenda everyone can follow so the meetings are clear and welcoming to new members.
- The best meetings include both work and fun. Check out sample ice breakers and ideas to keep things fun in the Resources section at [unitedway.org/student](http://unitedway.org/student).
- In addition to meeting as a student team, your core leaders, United Way, and campus advisors should meet regularly.



### #6 Clarify roles and responsibilities between your student group, local United Way, and campus advisors.

The Registration Form will help you clarify the roles and responsibilities between your student leadership, United Way, and campus advisors.

- Organize a group meeting with your student leaders, United Way sponsor, and campus advisors to discuss the items in the form.
- You can add, subtract, and move responsibilities within the Registration Form to reflect your local approach.

### #7 Become an official student organization.

Now that you've identified your campus advisor, gained endorsement from your local United Way, and obtained necessary information on campus to get established – it's time to become an official student organization on campus.

The process of becoming an official student organization on campus varies by school, but it includes a variety of benefits. These often include the ability to reserve meeting rooms and tables, the possibility of applying for funds to help offset operating expenses, and more.

- If you don't know where to start in the process, ask your advisor, check with your student government, and/or ask the equivalent of your office of student life or services as described in #3.
- Becoming a student group on campus often requires a constitution, bylaws and other criteria. You may also be required to follow specific codes of conduct with your club according to your campus rules and regulations. Make note of these requirements and prepare to send copies of all of this to your Local United Way and United Way Worldwide during registration.
- A sample constitution is available in the Resources section at [unitedway.org/student](http://unitedway.org/student).

### #8 Register your Student United Way with United Way Worldwide and keep records up to date.

Registering your group with United Way Worldwide is an important part of becoming an official Student United Way and includes a variety of benefits.

- You can access the registration form in the Resources section on the Student United Way webpage ([www.unitedway.org/get-involved/groups/student/resources](http://www.unitedway.org/get-involved/groups/student/resources)). You can also email [student@unitedway.org](mailto:student@unitedway.org) to retrieve a copy of the form.
- To keep your official Student United Way status year-to-year, you will need to complete and submit an annual survey at the beginning of the year and report on activities at the end of the year. If you don't receive the survey, email [student@unitedway.org](mailto:student@unitedway.org) to inquire about it.

### #9 Elect officers and start planning.

By this time, members of your group likely will have stepped up to lead. Organizing them into an officer structure will help continuity and effectiveness.

- We recommend electing officers annually. Your campus may have specific requirements in this area.
- A sample officer structure and examples of how to divvy up roles and responsibilities is found in the Resources section of [unitedway.org/student](http://unitedway.org/student). Remember to at least have a President and Treasurer.

### #10 LIVE UNITED

Congratulations! Now that your Student United Way is established, you can do even more to Give, Advocate, and Volunteer to advance the common good in the areas of Education, Income, and Health.

Your local United Way may have a variety of ways your club can get involved with their work. There are also ideas in the next section from United Way Worldwide as well as your fellow student leaders on other campuses.

# SUW201 – Management Principles of Student United Way

## Planning

Planning activities for and with other students is difficult. Classes, homework, exams, extracurricular activities and part time jobs are constantly vying for students' attention. The reasons why planning is difficult are the same reasons why it is an absolute necessity. With so many activities competing for what little time students have, Student United Ways need to ensure every opportunity to get their peers' attention is seized upon and executed flawlessly. Note – a crucial part of planning is creating a budget.

## Event Planning

Use these event planning tips for everything from your regular club meetings to large scale fundraisers.

### 1. Set Specific Measurable Goals

To see why, compare these two goals:

- Goal A: "Get 25 new members with 50 people attending the kick-off meeting"
- Goal B: "Recruit new members"

Goal A defines success (25 members) and an intermediate step (50 meeting attendees) to guide your work. With Goal B, however, how will you know you've succeeded? When you have a single new member? 10? 1,000?

### 2. Plan Backwards to Set Benchmarks and Deadlines

The best plans start from the end and work backwards. Here are a few illustrations:

- Say you want to distribute 500 fliers while "tabling" on date X. Planning backwards from X, when must team members have the fliers in hand? When should they be printed? Ordered? Designed?
- More generally, suppose you have a vision for an event on date Y. Planning backwards from Y, you must determine what has to be done, by when, and by whom for your vision to be realized. How much time will each step take?

You get the idea. It's not rocket science but rather a particular way of approaching a goal.

### 3. Use Realistic Estimates Like the "Rule of Halves"

The real world, of course, is often messier than we would like. It helps to plan for life's surprises. For example, experience shows that when 100 students RSVP for an event usually only about 50 attend. This is the "Rule of Halves." To avoid a low turnout at a Student United Way event plan to have twice as many RSVPs as you actually want to come. When half don't show up, you still succeed in getting 50 there! (And maybe you will be pleasantly surprised by 100 smiling faces.)

## Planning the Year

While the tips above also apply to planning a school year, there are other things that need to be considered. Planning a year of activities will take input from your entire leadership team and probably your general membership as well. After soliciting input, consider hosting an officer retreat to begin forging concrete plans. The keys to planning a successful year are to prioritize great ideas based on their potential impact versus club resources, anticipate the obstacles that would prevent your events from reaching their full potential, and immediately assign members to manage projects regardless of how far in the future they may be.

Imagine the various events that will be competing for other students' time and yours as well (mid-terms, holidays, finals week, sporting events, etc...). Avoid scheduling important events during these times where you will have to share the spotlight with competing interests.

The next step is to get visual! Chart your year and make a week by week plan for how you want to engage your campus. Below is an example of a week-to-week chart of a Student United Way's activities leading up to and

through an academic semester that begins in late August. It is not meant to be an all-inclusive example but does include some important benchmarks you will want to keep in the front of your mind.

| Month:   | July |   |   |   | August |   |   |   | September |   |   |   | October |   |   |   | November |   |   |   | December |   |   |   |
|--|------|---|---|---|--------|---|---|---|-----------|---|---|---|---------|---|---|---|----------|---|---|---|----------|---|---|---|
|  | 1    | 2 | 3 | 4 | 1      | 2 | 3 | 4 | 1         | 2 | 3 | 4 | 1       | 2 | 3 | 4 | 1        | 2 | 3 | 4 | 1        | 2 | 3 | 4 |
| Distribute flyers to dorms and recruit friends |      | ■ | ■ | ■ | ■      | ■ | ■ |   |           |   |   |   |         |   |   |   |          |   |   |   |          |   |   |   |
| Hang posters on campus                         |      |   |   |   |        |   |   | ■ | ■         | ■ |   |   |         |   |   |   |          |   |   |   |          |   |   |   |
| Launch Facebook page and blog                  |      |   |   |   |        |   |   | ■ | ■         |   |   |   |         |   |   |   |          |   |   |   |          |   |   |   |
| Organization Fairs – TABLING!                  |      |   |   |   |        |   |   | ■ | ■         |   |   |   |         |   |   |   |          |   |   |   |          |   |   |   |
| In-Class presentations                         |      |   |   |   |        |   |   | ■ | ■         | ■ | ■ | ■ | ■       | ■ |   |   |          |   |   |   |          |   |   |   |
| First Club Meeting w/UW Speaker                |      |   |   |   |        |   |   | ■ | ■         |   |   |   |         |   |   |   |          |   |   |   |          |   |   |   |
| Volunteer Reading Project                      |      |   |   |   |        |   |   |   |           |   |   |   | ■       | ■ | ■ | ■ | ■        | ■ | ■ | ■ |          |   |   |   |
| Holiday Food Drive                             |      |   |   |   |        |   |   |   |           |   |   |   |         |   |   |   | ■        | ■ | ■ | ■ |          |   |   |   |
| Big PR Event with Free Food                    |      |   |   |   |        |   |   |   |           |   |   |   |         |   |   |   |          |   |   | ■ |          |   |   |   |
| Officer Retreat and Member Reflection          |      |   |   |   |        |   |   |   |           |   |   |   |         |   |   |   |          |   |   | ■ |          |   |   |   |

Are there weeks that appear overloaded with activities? Have you considered which weeks have distractions like holidays or exams that will detract from your attendance? Are you providing yourself with a sufficient window to execute the project? Charting your year will help you maximize the time you spend on Student United Way. The average academic semester is only 16 weeks – make each one count!

### Succession Planning

It is important to put a succession plan in place to ensure your Student United Way’s momentum isn’t lost when leaders graduate, transfer or simply drop off the face of the earth. Current officers should be prepared to help train the next generation of leaders at the end of their term. Continuity binders, simple how-to guides filled with the knowledge of experienced officers, can help eliminate the brain drain that occurs when leadership is transferred. Every document created by your Student United Way is valuable to a future leader. If an officer group or committee contains all new members, documentation may save them from having to reinvent the wheel. See an example of a continuity binder at [www.unitedway.org/get-involved/groups/student/resources](http://www.unitedway.org/get-involved/groups/student/resources). As your Student United Way’s activity level increases members will need to step up to help with project execution. Identifying potential leaders and allowing them to chair committees is a great way to build a pipeline of experienced members who are primed to take the reins of the club in the future.

# Q&A

Three questions every Student United Way member should ask themselves about recruitment.

**QUESTION 1: Who is responsible for recruiting new members?**

**ANSWER:** There are two typical responses to this question. The first places responsibility on executive leadership or an officer tasked with recruiting members. While officers will certainly lead the charge they can't do it all alone. The other common response is that it's everyone's responsibility. Close, but not quite - assigning something as crucial as recruitment to everyone leaves zero accountability to anyone. The real answer? Every member should respond "it's MY job" when asked who is responsible for recruitment. Figure out what you can do to recruit new members and do it!

**QUESTION 2: When is the best time to recruit?**

**ANSWER:** When you're awake! You should always be ready to communicate the mission of Student United Way and your desire to get more people involved. You don't need to wait for events or formal opportunities. As long as you're near friends, classmates or even just your Facebook account, you have a golden opportunity to recruit. That being said, if you do find a way to recruit while not awake, please drop us a line and tell us how!

**QUESTION 3: What does the ideal member look like (major, age, gender, ethnicity, social group, etc.)?**

**ANSWER:** The ideal Student United Way member will look like anyone. The issues United Way tackles rise above political affiliation, race, gender or any other demographic trait that may define or divide people. Remember, it will take all of us working together to reach our goals. Keep that in mind as you recruit.

## Recruitment

What do successful college football teams, Fortune 500 companies, political campaigns, and campus based organizations have in common? Their success is due in large part to their ability to recruit new talent to help them achieve their mission.

Recruitment is the lifeblood of school clubs and Student United Way is no exception. There are a number of ways to recruit your peers. The various recruitment strategies have their advantages and disadvantages, but a well-rounded recruitment plan will include a number of items from the menu below.

### Invitational Recruitment

This is the most basic, and often the most effective form of recruitment. Invitational recruitment involves members (or other advocates like campus advisors, alumni or volunteers) educating people they know about Student United Way and asking them to engage with the club. You don't necessarily have to ask the person to join the club right away. You can invite them to attend a meeting with you, volunteer, or attend an event or social gathering to meet other members. Invitational recruiting can take place at any time, doesn't require any resources beyond your voice, and has an incredibly high conversion rate.

### Issue Advocacy-Based Recruitment

This form of recruitment allows you to use your Student United Way's expertise on community issues as a tool to engage other students. A great example of this would be members putting together a very brief PowerPoint to discuss early grade reading scores in your community. Members could present this PowerPoint in their classrooms (or the classes related to the topic of the presentation) and invite students to learn more and take action through Student United Way. Advocacy-based recruitment provides a larger audience than the one-on-one invites mentioned above. The conversion rate isn't quite as high because you're talking to a less targeted audience and no longer only speaking to friends and people you know personally. It should be noted that though many who hear your message may not become members, it still increases the general awareness of Student United Way on your campus.

### Event Recruiting

Holding large events can be a great way to draw attention to your club and get new people involved. They are also a great way to showcase your club's commitment to having fun while doing important work for the community. Events can be as simple as a pizza party where prospective members learn more about Student United Way, to something more intricate like a screening of a documentary that deals with education, income or health, followed by a facilitated discussion. The key is to get students excited about the prospect of working with your organization while capturing names and contact information for those students to make sure you follow up with them about



getting involved. Obviously, this requires a lot more resources (specifically time and sometimes money) than the previous two recruitment strategies. The upside is that you can reach a lot of people and the event can be a lot of fun for members to plan and execute.

### Tabling

Your school might have an organization fair where clubs are able to promote their activities and recruit prospective members. These opportunities are awesome because they 1) usually take place early on in the semester, 2) are attended by students who are already interested in joining a club, and 3) give your club the same legitimacy and visibility of organizations that may have more members or were established years before your Student United Way. Regardless of whether or not your campus has an official organization fair, you may be able to reserve a space to set up a table and promote Student United Way. Make the table engaging, give away free stuff (everybody loves free stuff), and make sure you collect contact information. Raffle an item like a LIVE UNITED shirt to everyone that signs up is a great way to entice people to provide you with their contact information. Make sure the table is covered by 2-3 energetic members at all times and consider increasing table staffing during lunch and class period transition when you're bound to see an increase in traffic.

### Retention

One of the largest problems that campus clubs and organizations face is member retention. Groups find a lot of enthusiasm and excitement at the beginning of the school year, but that seems to wane as time goes on.

#### Why does attrition occur?

The first step to understanding low membership retention is to identify the causes. Once the cause is identified, it is necessary to figure out a way to solve the problem. Following are nine potential factors that can influence a student to discontinue their involvement in a campus club (reprinted with permission from Dave Kelly, America's Student Leadership Trainer):

1. The organization is not what the student expected it to be.
2. The student did not understand the time commitments required.
3. Circumstances for the student have changed. These could include a conflict with class or work schedules, another organization that meets at the same time; and/or their academic load may be heavier than they originally anticipated.
4. Personality conflicts may have occurred with the organization's officers, advisor, or other members.
5. The financial commitment to pay dues, purchase pins and other club paraphernalia, attend meetings, etc., may be prohibitive to the student. Dues and financial commitments can make involvement prohibitive for many students.
6. The meetings may be poorly run and/or not very interesting and that will drive students away.
7. The group may not have enough activities to keep the member interested. Encourage the clubs to have a varied menu of activities, which do not require a lot of members to pull them off.
8. Members may perceive the organization as being "clique-ish". Increased service activity will combat cliques because so many different members will have to be involved.
9. The club or organization might not be enjoyable to be a part of. Members will find an organization more enjoyable if they feel welcome and also made a part of the group.

How can you further help your Student United Way combat these factors? Ask the leaders (not just officers, but also key members) to do an honest self-assessment and see if the above factors are present. Then, encourage the leaders to seek out members who have stopped participating to see which of the factors most influenced them to quit. Next identify resources that can help to reinvigorate the club such as professors, alumni, or members of the sponsoring organization if it is a chapter of a national group.

Here are some additional retention tips to help address some of the causes of attrition mentioned above.

### Increasing Retention through Recognition

Find a way to shower members with praise when they deserve it. Praise and recognition makes the club experience more enjoyable, demonstrates the fact that leadership is aware of individual contributions, and provides an opportunity to encourage a member that may not be as socially connected to other members but works hard to help the club achieve its mission. It also reminds all members of what they are able to accomplish through Student United Way.

Always frame recognition in terms of personal qualities the individual brought to the task (eg – John was reliable, showed steadfast determination, and great leadership) instead of simply highlighting the activity in the most basic of terms (eg – John stood outside by a table for 5 hours). Remember, praise doesn't have to come from officers. Creating a culture of recognition where members praise other members for going above and beyond is even better. You may want to make a "Member of the Month" program that awards points to members for things like attending meetings or volunteering.

### Increasing Retention by Hosting Great Events

You will produce or co-sponsor events for many reasons: to educate students about an issue; to make a direct impact through service; to raise money with a fundraising project; etc. Whatever the reason, events should have a clear purpose with an achievable goal communicated to members. Planning the event and executing effectively are crucial to engaging both prospective and current members. No one wants to stay on board a sinking ship with no captain and poorly planned events produce that exact feeling.

Use the planning tips presented earlier (plan backwards, rule of halves, divide responsibilities and start early) to ensure you do everything in your power to avoid bad events. When you have a great event, take and post lots of pictures and remind members that they helped make it possible. That feeling of success and accomplishment will factor in positively to their decision to stay on board.

### Increasing Retention by Running Effective Meetings

Beyond greatly increasing the productivity of a Student United Way, effective meeting management can be a great retention tool. If your meetings feel boring, repetitive, or ineffective, don't worry – it happens everywhere. Other clubs probably deal with the same issue from time to time and businesses around the world struggle with poor meeting management all the time. That doesn't mean meetings have to be boring and to retain members it is crucial that they aren't. Your club meetings are your primary point of contact with members and if their only experiences with Student United Way are poorly run meetings, the likelihood of them staying engaged is minimal.

Think of your meetings as small events and make sure you're giving them the same level of importance and forethought. There are a number of ways to run a meeting effectively. Some choose to use very formal procedures like parliamentary procedure to run their meetings with more structure (to learn more about Parliamentary Procedure, check out Robert's Rules of Order). While procedural structure can have a great effect on the effectiveness of a meeting it isn't for everyone. Simply having a goal in mind and remembering to keep it fun for all participants goes a very long way. Three very general keys to making a club meeting fun but still goal oriented are:

1. **Plan ahead:** Have an agenda prepared well ahead of time and send it out to members. Provide copies at the meeting as well. It may be good to run through the meeting with officers ahead of time. Nothing makes a meeting look more disjointed than when the people running the meeting aren't on the same page. Dry runs with officers will give you a chance to experience the meeting and determine if the content is too... well, dry! If it feels boring add a fun component to spice things up.

2. **Involve more people:** Don't let meetings turn into a report by officers on what they've done for Student United Way this week. Aside from being a bit dull, it can also alienate members that don't have a specific position but may still contribute a great deal to the organization. Solicit input from members for agenda items. You can also have standing opportunities on the agenda for members to provide feedback. These can include introduction of guests, volunteer reflection, or "Cheers and Heads Ups" where members celebrate the actions of other members or make general announcements. Call members and prospects prior to the meeting to make sure they will be in attendance. Sometimes just having more members present can improve the overall feel of a meeting. It may also be good to involve community members (United Way staff, agency directors, school staff members) to speak to your members about their area of expertise.
3. **Follow up:** Sending out minutes in a timely manner can help remind members of action items or assignments that came from the meeting. It can also let those who were not in attendance know they missed an important and fun gathering. If increasing meeting attendance is an important growth opportunity, send thank you notes to members that attended and requests to those that did not attend to take part in the next meeting. If someone provided really great insight or a brave testimonial, celebrate them privately with a personal thank you and publicly with a mention of their contribution in meeting minutes or during the next meeting.

### Increasing Retention through Team Building or Social Events

Leave business behind for a day and encourage your leaders and general members to come together for some fun. Cliques are a natural part of any organization. As a leader, part of your job is to create opportunities to eliminate silos and ensure all members are working together effectively.

Your campus may provide fun team building opportunities like a ropes course. You may find more value in creating an unstructured opportunity that is less formal. After a meeting (or even in lieu of a meeting) take everyone to your local pizza or ice cream spot and just let members get to know each other in a stress-free



climate. Everyone should feel like they have friends in the club and no one should feel like they have enemies. If specific interpersonal relationships are negatively affecting the health of your Student United Way, address them immediately. A small rift in the club, if left unchecked, can lead to a mass wave of attrition at any time. If you don't feel comfortable handling it on a peer-to-peer level, contact your campus advisor to act as a mediator between the parties.

There are simple ways to increase connections at the individual level. Try introducing fun ice breakers to your meetings so people get to know each other. You can also try implementing a Big-Little mentoring system (in which loyal members mentor new members) to ensure new members have a positive and engaged member that will reach out to them to keep them active.

There are too many things to list that can positively affect retention. If you feel that retention is a problem, diagnose why members are leaving and take a look inward at what you can do to curb that behavior in the future.

## Communications

One of the most important roles of student leaders is to act as the voice of the club. Student United Ways need to communicate clearly and effectively with a diverse audience: club members, other students on campus, the media, the local United Way, community agencies, other community leaders and the general public. Remember: youth are an important voice for change.

### The Message: INVITE, CONNECT, COMMIT

Before you're ready to communicate to your audiences, you must first master the United Way message. In order to recruit new members and invite them to be a part of the change, your Student United Way must speak with a united voice. Every conversation you have about United Way should include the four components of our message platform:

#### **BRAND POSITION:** What We Stand For

United Way advances the common good by creating opportunities for a better life for all.

#### **GOALS:** What We Are Trying to Accomplish

Our focus is on education, income and health—the building blocks for a good quality of life.

#### **ROLE:** How We Work to Achieve Our Goals

United Way recruits people and organizations who bring the passion, expertise and resources needed to get things done.

#### **PORTRAY THE ROLE:** Do It, Don't Just Say It

We invite you to be part of the change. You can give, you can advocate and you can volunteer. That's what it means to LIVE UNITED. [This is also where you can identify yourself and discuss programs run by your Student United Way. Use this as an invitation to volunteer with your club.]

United Way's brand position sets it apart from other charitable organizations by illustrating the fact that we're all in this together. Unlike charities that base their appeal on giving to the needy (the "haves" giving to the "have-nots," "us and them") United Way recognizes that we are all part of something greater, and that a tear anywhere weakens the entire social fabric.

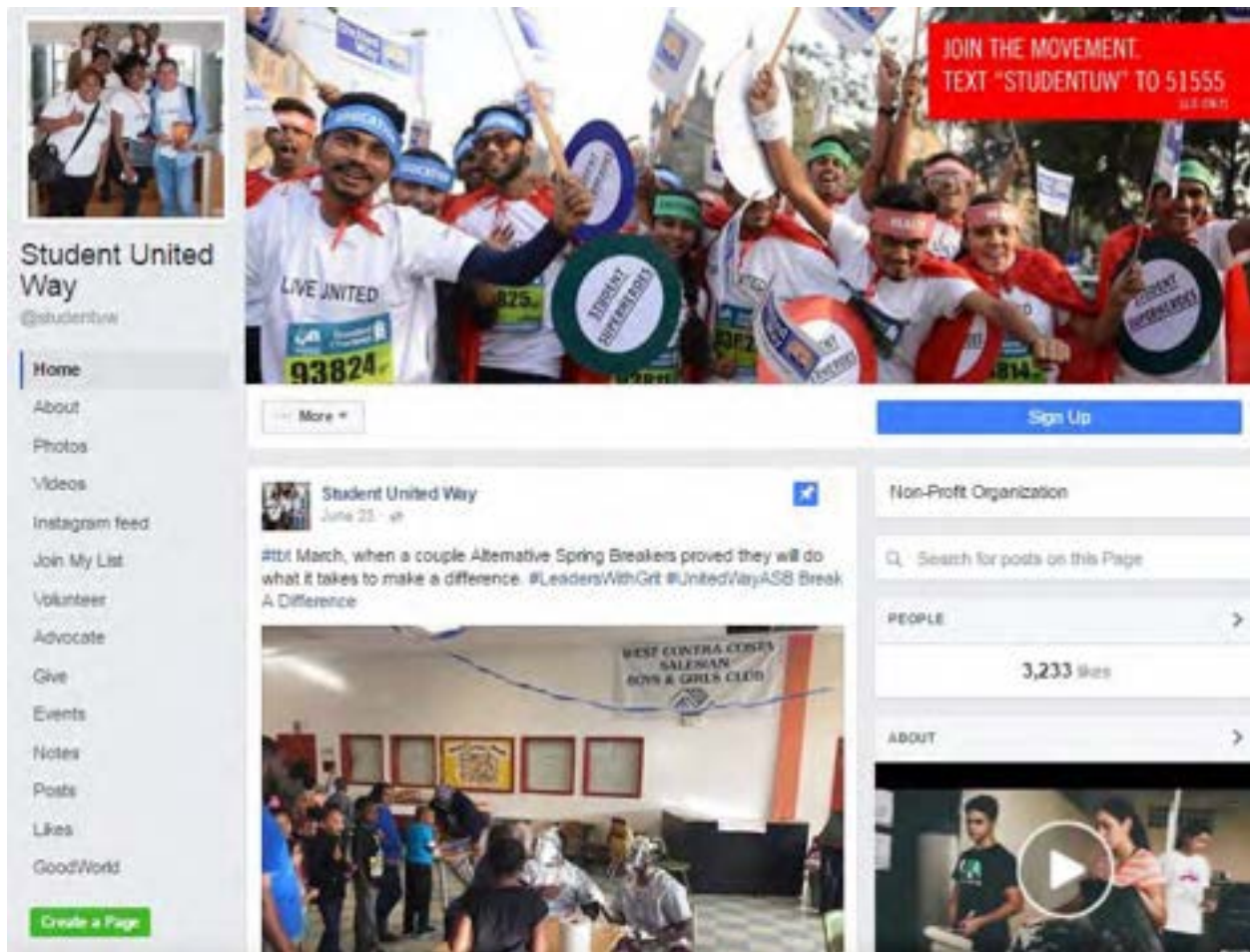
Practice communicating these ideas and you will develop a great elevator pitch – a short speech that quickly conveys an overview of the organization. Once you have a strong grasp on the four components, use specific examples in your community to highlight an issue, illustrate how your Student United Way is recruiting people to solve the problem, and your invitation for others to LIVE UNITED using United Way's message platform.

Incorporate these messages into every marketing piece and keep in mind the reason behind your communication: you are trying to invite, connect and commit more people to your cause. Below you will find the different communication channels you should master in order to run your Student United Way effectively.



## Social Media

Facebook, Snapchat, Instagram, Twitter, YouTube, LinkedIn... These are just a few of the options available to your club. Each has its advantages and disadvantages. Some are better for video, others may be better for fundraising. At a minimum, every Student United Way should have a presence on Facebook. Leveraging social media outlets can help quickly promote the work of your Student United Way. It is also very important that you and your members follow the worldwide Student United Way Facebook page ([facebook.com/studentuw](https://facebook.com/studentuw)) to receive updates and hear about opportunities from United Way Worldwide.



Here are some tips for using Facebook effectively:

- There are two options on Facebook your Student United Way should look into: Pages and Groups.
  - **Pages** on Facebook provide organizations with a very public space to share multimedia, communicate results, and start a dialogue with others. They are great for marketing and recruitment. Since you do not have to have a Facebook account to view a Facebook Page, it can practically be used as your organization's website. Pages have great picture and video sharing capability, the ability to blog long-form entries through notes, and can provide analytics to administrators to see how many people viewed your page and the viral reach of your posts.

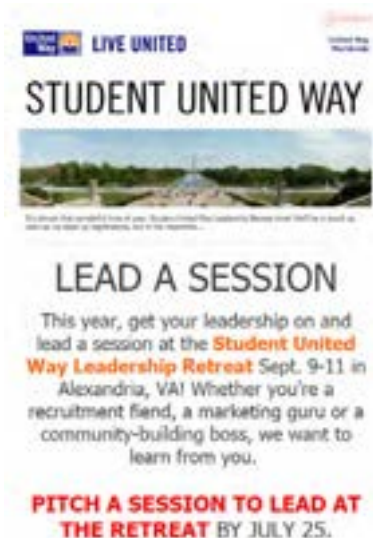
- **Groups** on Facebook are a more private forum, ideal for communication between club members or maybe even just between student leaders. Groups can be open to all or “Closed” meaning in order to view or post content a Facebook user would need to have permission from the Group administrator. Groups offer internal document sharing, notifications to Group members when activity takes place and a few other features that really make it suitable for a small, contained audience.
- You may find that using both Pages (as your public communication tool) and Groups (as your private inter-officer information sharing tool) is the best option for your club.
- Remember your posts represent the global United Way movement. Double check spelling and grammar and make sure the content you post is inclusive and appropriate.
- Having trouble coming up with content? Steal ours! ([facebook.com/studentuw](https://facebook.com/studentuw) and [facebook.com/unitedway](https://facebook.com/unitedway))
- The best times to post to Facebook is off-peak hours (namely evenings and weekends). These posts tend to have higher viewership and “virality” (percent of users that like, share or comment on your post). If you’re unable to post on evenings and weekends, you can schedule posts to appear at a later date and time.
- Be consistent in how often you post. This keeps viewers engaged and communicates that your Student United Way chapter is consistent.
- Don’t be afraid to post more than once per day. An increase in posts increases the chance users will come in contact with your message. Just don’t overdo it or users may block your feed.
- Pictures and video typically receive more interactions than plain text. If you are posting text, try telling a story or posing a question to your followers.
- Always include a call to action or some concrete step(s) followers can take. Post a link to sign a petition, list details of an event, link to a poll, or pose a question and explicitly ask for responses.
- Make sure you keep all of your web presences up to date. A dormant social media account can be worse than not having an account at all.
- You may want to branch out beyond just using Facebook. This is strongly encouraged! You can use sites like Hootsuite to simultaneously post your photo on Instagram, Facebook and Twitter with the click of a button. Just make sure to adapt your style to each social media platform. Communicating the same way on all of them may frustrate fans or followers.

## Email

Your Student United Way should send email announcements and recruitment pitches to students, student groups, and other audiences. You want as many people as possible to open, read, and act on your email. Students receive dozens of emails a day but don’t necessarily open or read them all. The tips below will help Student United Way emails stand out in crowded inboxes.

Here are some tips for using mass email effectively:

- Always collect email addresses. ALWAYS!
- Your subject line is your first impression. Make sure your subject is enticing, clear, and of interest to the demographic receiving the message.
- Don’t overdo email communication. Students will quickly request



to unsubscribe from your list if they feel like you're sending them spam. Create a regular schedule for when mass emails will be sent and encourage members to provide updates in a timely manner. That way you won't be rushing to throw together multiple messages a week at a whim.

- Your school may provide listservs to student clubs to help you manage who will be receiving your messages. If you don't have access to a listserv, make sure you always include the addresses of recipients in the blind copy (BCC) field. If someone asks to be removed from the list, honor their request immediately.

## Websites

An official website for your Student United Way can add a great deal of professionalism to your organization. Business leaders and campus officials may not want to engage with your club through Facebook.

Here are some tips for using your website effectively:

- Keep the website up to date. Broken links and pictures send a negative message to people viewing your page.
- Content should reflect the mission, vision, and activities of your club. You should also provide easy ways for students to get involved on the ground (like future meeting dates or volunteer opportunities) and online (allowing them to sign up for email communications and connecting them to your social media accounts)
- Use the brand book to guide your color and font choices. Download the brand book in the Resources section of [unitedway.org/student](http://unitedway.org/student).
- Your school may offer a free website to official student organizations. Take advantage of it!
- Many non-profit organizations are using Tumblr, WordPress, Blogspot and other blogs as their official webpage. Other services like Weebly.com and Wix.com also provide free or low-cost solutions to make stunning websites for your club.



## Print Pieces

Flyers, posters and other leave behinds can be the most effective communication tools in your arsenal if used correctly. Make sure your print pieces stand out and showcase both the fun and passion for community change that exists in your Student United Way.

Here are some helpful tips to using print pieces effectively:

- Print pieces should always provide a good amount of information as well as opportunities to learn more (either web URLs, reference to social media pages, or an email address).
- The drawback to print pieces is that they have a cost. There are many ways to save money by printing in black and white or producing quarter page flyers. Color paper often costs the same as white but will provide extra pop to your print pieces. If your flyer relates to a

one-time event, print them early. Once the event has passed the value of the remaining print pieces is lost.

- Pay close attention to brand guidelines when producing print pieces. They exist to help ensure you are using United Way trademarks in a consistent and aesthetically pleasing way.
- If you are working on a large-scale event and have lots of lead time, you should try to coordinate with the marketing and communications professional at your local United Way to see if they can provide guidance or expertise.

### Press Releases and Media

You can spread your message to wider audiences through all kinds of free media coverage, including TV, print, and radio, and new web-based media like blogs. To cover Student United Way events reporters need to hear about your work – from you!

Here are some tips for working with the media effectively:

- Reach out to your local United Way. They may already have media contacts.
- Create your own list of media outlets. You may have a better understanding of campus newspapers than your local United Way.
- Get to know reporters. Set up meetings with them, explain the mission and vision of Student United Way, and build relationships with them. This can increase the chance of your stories and events getting covered.
- Think about other areas of the newspaper that may provide your Student United Way with valuable real estate. Editorials, public announcements, and community forums may provide you with exactly what you need.





# SUW301 – Basic Programing for Student United Way

## Selecting Opportunities for Involvement

Now that you've mastered planning and recruitment, it is time to select opportunities for involvement. You will be approached by members and external groups with potential opportunities. It is very important to give honest consideration to every request, especially those that come from members, but ultimately it is up to club officers to decide whether or not club resources will be deployed, and if so at what level.

Here are a few things you should always consider:

- Alignment with GIVE, ADVOCATE, VOLUNTEER – Is this an opportunity to live out LIVE UNITED?
- Alignment with EDUCATION, INCOME, HEALTH – Will this project move the needle in United Way's focus areas – the building blocks for a good life?
- Alignment with Student United Way focus area – Your club may find a niche in education, income and health where your members can make the most impact. Will this project take you away from your strategic focus?
- Alignment with local United Way – Education, income and health covers a very broad spectrum. Your local United Way currently funds agencies and/or programs in these areas and you can use that as a backdrop to narrow your own focus. Would your local United Way commit resources to this project?
- Return on Investment – This consideration is particularly important for external collaborations. In selecting the right opportunities, it is entirely appropriate to ask "What's in it for Student United Way?" If you have two opportunities that require the same amount of resources, wouldn't it make the most sense to pick the project with higher visibility to attract more members to your cause?
- Resources needed – Consider the resources necessary to get the job done including money, time, bodies, and expertise. Do you have them or have access to them?

## Developing Budgets

It is crucial for your Student United Way to have a financial plan and keep a record of receipts and expenditures using a budget. While maintaining the budget and tracking transactions will probably be the role of the treasurer, all officers with input from the general membership should work together to develop the budget. This ensures volunteer projects, meetings, and events aren't under-resourced. It may also be a good idea to run your budget by your campus advisor and United Way advisor since both can provide great feedback on the numbers you present.

There are a number of online resources that provide guidance on how to create a budget. You may also want to check with your school to see if they offer courses for registered student organizations on budget management. Hopefully, your club's treasurer will have experience working with numbers as well. With the countless resources available online and on campuses, here we will just review a few tips on budgeting for Student United Ways:

- Record EVERYTHING! Every expense and receipt must be tracked. Take a picture of each receipt as soon as you receive it to make it easy. Keep back up (receipts, invoices, etc.) for your transactions.
- Have policies and procedures in place. If someone is working on a project for the club and spending their own money, make sure the expectations for reimbursement are well-established and communicated before-hand.

- Contributions to your club with no specific earmark are easiest for your club to work with, but sometimes it is easier to get donations when you're specific about how you intend to use that contribution. Clearly explain where contributions to your Student United Way are going. If you are having a fundraiser for your local United Way, make sure every dollar gets to your local United Way. If a business sponsors a specific project, make sure those funds are used for that project. If a change in how contributions are being allocated needs to be made, communicate that with the contributor.
- Beyond the annual budget, you may find it necessary to create individual budgets for each event, project and program.
- You may want to add a line item in the budget to send a representative(s) to the annual [Student United Way Leadership Retreat](#).
- Categorize your expenses. Some categories you may want to consider are
  - Funding for Student United Way meetings, events, projects and programs
  - Membership recognition and other LIVE UNITED swag
  - Conferences, travel and other learning opportunities

## Funding

### Typical Fundraising Activities for School Clubs

Fundraising events can be planned around anything from athletic tournaments, to video games. Revenue can be generated through charging admission, food and beverage sale, raffles and silent auctions. There are many examples of event based fundraisers throughout the Student United Way system.

Local restaurants in your area may also host “restaurant nights” where a local non-profit receives a percent of proceeds generated during a predetermined time period. It’s a win-win for you and the restaurant because your Student United Way receives a donation and the restaurant receives a higher volume of customers. Restaurant nights usually aren’t incredibly lucrative, but they take very little time to execute and there are a number of ways to make them well worth the effort. Schedule these events on a monthly basis and have the entire year set as early as possible. Planning ahead allows you to recruit more people to your cause. Some organizations, like fraternities and sororities, typically have a scheduled dinner time. Ask them if they would like to have dinner at your restaurant night fundraiser to invest dollars back into their community.

Your Student United Way can also host a sale of some sort. Bake sales are very popular on school campuses. Other Student United Ways have had great success with community-wide garage sales. The key to this type of fundraising (and perhaps life in general) is to get other groups to do the work for you. Ask how your club can engage other groups as participants in a creative way that takes some of the burden off of your members. You may find that beyond making your life easier, it will also increase participation now that a larger group of people have something at stake in your fundraiser.

The easiest way to fundraise is to simply ask your peers or community members to give to your cause. This can take place on the ground through panhandling, emailing or mailing letters, or standing in front of businesses to solicit patrons. You may find more success friend-raising from your peers using online tools. [Facebook Causes](#) allows you to create projects for funding through the popular social networking site that many of your friends are already logging into every day. [Razoo.com](#) and [GoFundMe.com](#) also provide wonderfully easy interfaces to raise money for a cause. When fundraising online, funds will most likely need to go through your local United Way. If you wish to raise funds for a specific project, you will need to communicate with your United Way before any fundraising begins to ensure they are willing to act as your financial processor.

## Funding through Campus

Some schools provide registered student organizations with funding to offset many of their costs. Funds may cover some basic operating expenses incurred by most clubs like printing, photocopying, and refreshments for club meetings. Some campuses also have funds set aside to help student leaders attend conferences. To determine eligibility and learn more about the funding available, it is best to reach out to your campus' student government, leadership and service department, or similar student activities and involvement umbrella group. These funding streams dry up fast so make sure you submit requests as early as possible.

## Business Sponsorship

Local businesses can make a monetary contribution or in-kind donation (a contribution of a product or service) to help offset the cost of special events, travel to the annual Student United Way Leadership Retreat or supplies for volunteer projects. Appeals to local business are usually done through a face-to-face meeting, a letter or both. You should spell out exactly what funds will be used for in your appeal and, if applicable, provide the decision-maker with any incentives you can provide the business in return (eg – logo placement, positive press, etc.). Check with your local United Way prior to solicitation. They may have relationships with businesses you are interested in soliciting.

## Grants

Grants are not a common revenue stream for school clubs, but they do play a major role in providing income for non-profit organizations. Grants differ greatly from general donations. The grantee (the individual or organization receiving the grant) has to apply for the funds, usually through a request for proposals (RFP) issued by the grantor (grant making institution). Beyond the increased work in obtaining funding, there is often an explicit requirement to report activities and expenditures that isn't true of a general donation. Despite the added workload, grants can provide targeted dollars to achieve your mission and the increased accountability may help you focus on results. The majority of grant opportunities will require your United Way to be the applicant as grantors often want to work with established organizations with a successful track record. There are, however, some grants that are made to individuals and unincorporated groups. You will want to look for grant opportunities with keywords like "youth engagement" that fund projects related to education, income and health. Some organizations, like Youth Service America, do a great job of aggregating funding opportunities for young people on their website.

Before applying for any grant, consult your United Way and campus advisor. Your advisors can help you plan your project and establish realistic goals. Grants are binding contracts. If you do not live up to the expectations set by the grantee you may be asked to repay funds.

“...To know that one life  
has breathed easier  
because you have lived:  
This is to have succeeded.”

-Ralph Waldo Emerson

## Evaluation and Reflection

After every event, project or program you and your club members should take time to truly reflect on how well you were able to execute and the value of the finished product relative to the resources invested. Some projects, particularly the very complex ones, seem like a great idea on paper but yield lackluster results. Without proper evaluation and reflection we may get stuck repeating the same actions in the future when other, simpler tasks would provide more bang for the buck! Consider using surveys after each event, project or program to gauge people's experiences. To gauge success, you might utilize survey responses, hard numbers (such as 250 canned goods collected), and personal feedback from club members. Keep in mind, though, that some projects have a variety of benefits. A fundraiser may not be as financially successful as you hoped, but if it spreads awareness of LIVE UNITED and United Way across campus it may still be a valuable endeavor. Evaluate all outcomes during your reflection.

# SUW401 – Connecting to the Network

## Student Leadership Retreat

Each year, the Student United Way Leadership Retreat offers student leaders, campus advisors, and United Way representatives from around the world a chance to connect with students from other schools, build skills and share promising practices.

Anyone interested in Student United Way is invited to attend, creating a great mix of new and seasoned student leaders, United Way staff and campus advisors. The retreat, held annually at the Mary M. Gates Learning Center in Alexandria, Virginia, dedicates much of the agenda to direct interaction and club sharing. Students are able to ask questions and share their knowledge, ideas and experience with one another. Participants also:

- Build leadership skills
- Attend hands-on workshops from campus-organizing pros
- Develop relationships with student leaders, United Way professionals and campus advisors
- Get an inside look at United Way and start or grow their own Student United Way
- Learn how students can LIVE UNITED by giving, advocating and volunteering

Why should you consider attending?

- Inspiration, networking and idea sharing
- Training tips and techniques, ice-breaker ideas as well as materials for use
- Workshops on club management, member recruitment and retention, social media and raising funds
- Learning about Student United Way goals, objectives and ways to get more involved
- Meeting new student leaders and learning new ideas, brainstorming, collaborating and connecting with other students sharing the same purpose

For current information on the upcoming Student United Way Leadership Retreat visit [www.unitedway.org/get-involved/groups/student/leadership-retreat](http://www.unitedway.org/get-involved/groups/student/leadership-retreat).

## Alternative Spring Break

Every year since 2006, United Way has provided students with an opportunity to give back during their spring break. Thousands of students have traded in their swim suits for tool belts and participated in Alternative Spring Break in dozens of communities across the country, contributing tens of thousands of hours of volunteer service.

Participating students indicate that the Alternative Spring Break experience has inspired them to improve their communities, as a leader and volunteer, when they return home. It has also been the catalyst for the development of numerous Student United Ways and continues to support student participation in this unique program. For information on upcoming United Way Alternative Spring Break opportunities visit [unitedway.org/asb](http://unitedway.org/asb).

## Student United Way Awards

Student United Ways are working hard to advance the common good by giving, advocating and volunteering. All of this hard work has not gone unnoticed. The annual Student United Way Awards is the United Way

network's way of recognizing the outstanding clubs, projects, student leaders, and volunteers achieving great results. Categories might include:

- Campus Organization of the Year – The cream of the crop. This award goes to the Student United Way organization that is simply a cut above the rest. Everything, from leadership and recruitment to quality of projects, shows high value and measurable success.
- Student Leader of the Year – Awarded to a student that dedicates themselves to the betterment of the club and achieves great results in the process.
- Campus Advisor of the Year – Awarded to the campus advisor that goes above and beyond the call of duty.
- LIVE UNITED in Action Awards – Given for outstanding events, projects or programs that embody the pillars of United Way and the LIVE UNITED movement. The categories might include:
  - Give
  - Advocate
  - Volunteer
  - Education
  - Income
  - Health



### Day of Action

United Way Day of Action mobilizes volunteers on the same day every year, June 21, in a highly visible way, to inspire people to channel their passion into lifelong action. It is an opportunity for United Ways to build on their strategies to improve education, income and health. Day of Action allows people to make the connection between their efforts – whether it's reading to children, improving financial literacy, or getting more kids in motion – and how it will lead to a stronger community.

Your local United Way may have opportunities ready or you and your members can work together to identify projects for your fellow students to take on. Student United Ways should think of Day of Action as a great way to keep members engaged over summer or, if you have members enrolled in summer classes, you can use Day of Action as a summer recruitment tool. If the majority of your members are back home for summer, try to bring an act local/think global approach to your Day of Action. Encourage members to volunteer remotely in their home-towns and post their volunteer experiences live to your Student United Way's Facebook page.

### Find More GIVE, ADVOCATE and VOLUNTEER Projects from the Network

There are a number of great examples of projects from around the network. Here are a few ways you can get connected to some fresh ideas:

- Check [unitedway.org/student](http://unitedway.org/student) for resources mentioned in this document and more
- Like the worldwide Student United Way Facebook page ([facebook.com/studentuw](https://facebook.com/studentuw))
- Like the pages of Student United Way clubs around the world and listen to what they're doing
- Attend the annual retreat

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