

LIVE UNITED



LIVE UNITED

A credo. A mission. A goal.

A constant reminder that when we as individuals think outside ourselves, we have the power to facilitate change. When we think of others lives as linked to our own, our compassion grows. When we reach out a hand to one, we influence the condition of all. We build the strength of our neighborhoods. We bolster the health of our communities. And we change the lives of those who walk by us every day.

More, it is a command.

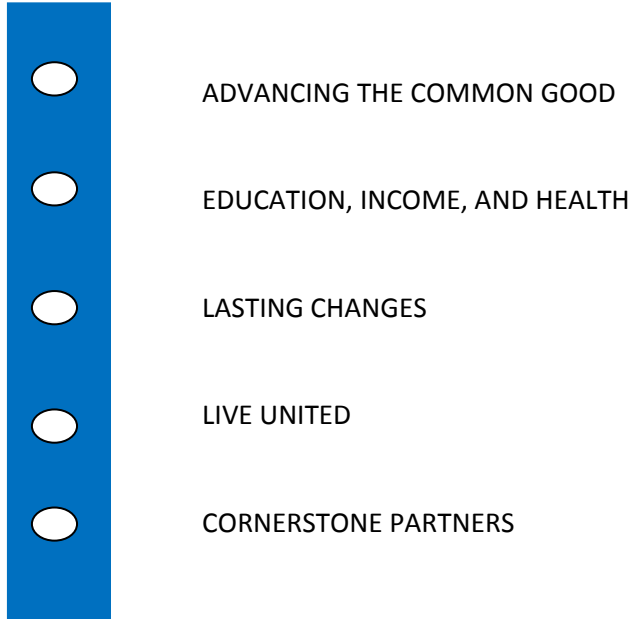
TO GIVE. TO ADVOCATE. TO VOLUNTEER.

Because united, we stand. United we elevate.

United, we persevere. United, we move through. Above. And beyond. United, we can change what we see in our world.

The LIVE UNITED campaign is about the power of unity.

Our communication strategy has five key message drivers or dots to connect.



KEYMESSAGES AND MESSAGE SUPPORTS

ADVANCING THE COMMON GOOD

Advancing the common good means **creating opportunities for a better life for all.**

- When we reach out a hand to one, we influence the condition of all.
- We all win when a child succeeds in school, when families are financially stable and when people have good health.
- These results/changes have benefits that ripple out to the community as a whole.

EDUCATION, INCOME, & HEALTH

These are **basic things that we all need for a good life:** a quality education that leads to a stable job, income that can support a family through retirement, and good health.

- United Way is focused on the building blocks for a better life:
 - Education – Helping Children and Youth Achieve Their Potential
 - Income – Promoting Financial Stability and Independence
 - Health – Improving People’s Health

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LASTING CHANGES

Our goal is to create **long-lasting changes** by addressing the underlying causes of problems.

- We don't just address the symptoms of a problem. We go deeper to get at the underlying causes.
- We try to make system changes that prevent problems from happening in the first place.

LIVE UNITED

Living united means being a part of the change.

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

CORNERSTONE PARTNERS

100% of your gift will be invested in our local community, thanks to United Way Cornerstone Partners who cover our overhead expenses.

FORMULATING THE MESSAGE

The four key messages will help you to describe *who we are*, *what we do*, and *why you should* get involved and provide the framework for creating your personalized campaign pitch. Mix and match the message supports to find the most comfortable way to talk about United Way. Then add your own LIVE UNITED story about why you are involved with United Way and talk about why you think it is important to give, advocate, and volunteer. Here are some examples:

#1

United Way of the Columbia-Willamette is working to advance the common good by focusing on the building blocks for a good life: education, income, and health. We all win when kids succeed in school, families are financial stable and people have good health. Our goal is to create long-lasting changes that prevent problems from happening in the first place. Being part of the change is what it means to LIVE UNITED. I volunteer with United Way because [insert your reasons]. In addition to volunteering, I also give because [insert your reason]. I invite you to join me in supporting United Way because I know that by working together, united, we can inspire hope and create opportunities for a brighter future. By the way, did you know that 100% of your personal or company's contributions will be invested locally in critical programs?

#2

United Way of the Columbia-Willamette has been working to advance the common good in the four-county Portland/Vancouver area for almost a century. We are creating opportunities for a better life for all by focusing on the basics we all need to to succeed: a quality education that leads to stable job, income that can support a family through retirement, and good health. What I like about United Way is that they are creating long-lasting changes in our community that prevent problems from happening in the first place. Living united means being part of the change. I LIVE UNITED by giving to United Way because [insert your reason]. You know, it takes all of us working together to create a stronger community. Won't you join me in LIVING UNITED by showing your leadership in this year's annual campaign?

#3

Our United Way creates opportunities for a better life for everyone in the community by focusing on the basics we all need to succeed: education, income, health. We are committed to helping children and youth achieve their potential. We help individuals and families to become financially stable and independent. And we are working to improve people's health and access to healthcare services. United Way brings the right people, resources, and ideas together to create long-lasting changes that prevent problems from happening in the first place. I give to United Way and volunteer because [insert your reason]. Being part of the change is what it means to LIVE UNITED. You have an opportunity to show your leadership in this year's campaign and join us in creating a brighter future for our community. By the way, did you know

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that 100% of your personal or company's contributions will be invested locally in critical programs?

BUILDING THE CUSTOMER RELATIONSHIP

Imagine a Rubik's cube. One side are the building blocks for a better life: education, income, and health. On the other are the three engagement strategies: give, advocate, volunteer. And on the other side, it has our formula for improving relationships: ask, thank, and inform. Instead of getting all the sides to match like a regular Rubik's cube, our job is to mix them all up so our supporters understand our work (education, income, and health), participate on an ongoing basis (give, advocate, volunteer), and feel a stronger connection (ask, thank, inform). What this means is that for each of the three action areas – education, income, health – we have to provide opportunities to give, advocate, and volunteer. And with each engagement opportunity, we begin with an ask, followed by a message of thanks, and ongoing updates on our progress.



GIVE	ADVOCATE	VOLUNTEER
EDUCATION	INCOME	HEALTH
ASK	THANK	INFORM

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The ask is critical and must be explicit. When people recall having been asked to give to United Way, there is a much greater chance that they will do so. In studies, 22% of the general pop gave to United Way. When people were asked to give, that figure jumps to 50%. In a UW workplace campaign, the odds improved to 70%. What's more, almost half of the respondents in the research study who were lapsed donors said they didn't give because they were never asked or never contacted.

Investors must also remember **being thanked**. Donors who remember being thanked for their contribution are twice as likely to give to United Way again and recommend UW to friends.

When investors **received information** from United the likelihood of giving jumped from 51% up to 78% and their likelihood of recommending UW jumped from 34% to over 50%.

FREQUENTLY ASKED QUESTIONS

What is United Way of the Columbia-Willamette?

United Way of the Columbia-Willamette is a local, nonprofit organization that works to advance the common good by focusing on the basic things we all need for a good life: education, income, and health. Our goal is to create long-lasting changes that prevent problems from happening in the first place. United Way has been helping people in the four-county metro area since 1920. We work with community leaders and service providers to identify and prioritize the needs, leverage contributions, and achieve measurable results. Our grant-funding model identifies partners and projects that promote collaborations, efficiency, innovation, and results. By working together, united, we can inspire hope and create opportunities for a better tomorrow. That's what it means to LIVE UNITED.

What makes United Way different from other charities?

No other single organization meets the broad range of needs addressed by United Way. United Way goes beyond fundraising by researching the needs of the community and bringing the right resources and people together to solve tough local issues. We work with business, government, and partner agencies to develop regional health and human service policies and strategies. We fund programs that are meeting people's needs today and we're working on innovative solutions for lasting change. United Way monitors the performance of grant-funded projects and reports results to donors. We also recruit and train volunteers for nonprofit agencies and provide volunteer resources in the area of management and technical assistance, training and board leadership.

Why give to the United Way Campaign?

- **It makes a difference.** 100% of your gift goes to help children, individuals, and families right here in the Portland/Vancouver metro area. You are making an investment that benefits the entire community, not just one program, issue, or population and it leads to a stronger, more sustainable place to live and work. We all win when a child succeeds in school, when families are financially stable and when people have good health. United Way can also connect you with opportunities to volunteer and advocate for change in our community.
- **It's a smart investment.** We are experts at managing donor investments and bringing the right people, ideas, and resources together to solve the most pressing needs of our community and finding innovative solutions for lasting change. United Way leverages your contribution by combining it with others and strategically investing in results-driven program and initiatives to maximize the impact we have in the community.
- **It's easy and convenient.** United Way offers the convenience of payroll deduction through the support of local employers, allowing employees to give a substantial annual gift through small weekly contributions. The annual United Way campaign offers a number of advantages for you as a donor. It's efficient: With lower fundraising costs, more money can be invested in our community. It's convenient: Once a year, you decide how much you want to invest, and the donation comes right out of your paycheck. Spreading your giving throughout the year makes it easier to give significantly and still stay within your own budget. You may also give online through our site or make a direct donation.

What if I don't think I can afford to give?

By using United Way's payroll deduction plan, you can invest even a small amount each pay period, and see it add up to a significant gift by year's end. Your investment combined with thousands of others will have real, measurable impact in the community. A contribution of just \$5 a month can change lives!

Can I give in other ways besides payroll deduction?

United Way offers several other convenient ways to give:

- Online at www.unitedway-pdx.org
- Cash or check
- Credit or debit card including Visa, MasterCard, American Express or Discover. Make a one-time gift, or contribute monthly.
- Donate stock, securities or real estate. Thanks to tremendous tax advantages, donating appreciated securities has become very popular, provided you have held the securities for at least one year. When you donate appreciated securities to United Way, you pay no capital gains taxes and 100% of the stock is tax deductible. Consult your broker and United Way for further tax-saving information.

Can I designate my gift to a specific nonprofit or community partner?

Yes. Through United Way of the Columbia-Willamette you can give to any registered tax-exempt 501(c) 3 non-profit organizations. Thanks to Cornerstone Partners who cover United Way overhead, 100% of your gift will go to the charity you designate. However, you should know that we can't hold agencies to our standards of accountability if we don't have a grant-funding relationship with them. The best way to make the greatest difference in our community and achieve results is to donate to United Way Community Fund.

Why should I give my money to United Way and not just directly to agencies?

United Way addresses more than one issue and helps children, individuals, and families that are most in need. We work with more than 100 collaborating partners and identify and prioritize the most pressing needs in our community. When you give directly to an agency, we can't offer the extra value of United Way's expertise applying your gift where it can have the greatest impact in the community and we can't monitor your investment or track results. Giving to United Way allows you to multiply the effect of your contribution because we are able to help agencies leverage more public and private dollars. You'll also be helping reduce costly and time-consuming fundraising efforts for the agencies so their time can be spent helping others.

How is my contribution invested?

United Way uses a grant funding model that strategically invest in partners and projects that demonstrate collaboration, efficient and effective use of resources, and measurable results. We conduct research to identify and prioritize the needs of the community. About 75 well-trained volunteers and expert United Way staff work together to identify the best ways to solve issues in the four counties we serve. Our priority is funding programs that help children and youth reach their potential, help families and individuals become financially stable, and provides access to health care.

Does United Way condone pressure to give?

No. United Way is based on the concept of voluntary giving and we believe that no one should ever be pressured into giving. In our experience, the best and most responsive giving comes voluntarily from a person's understanding of the needs and a desire to make a difference. If you feel pressured, we want to know about it. Please contact Mark Todd, Vice President of Brand Strategy at 503.226.9325 or email markt@unitedway-pdx.org.

What is United Way's operating cost?

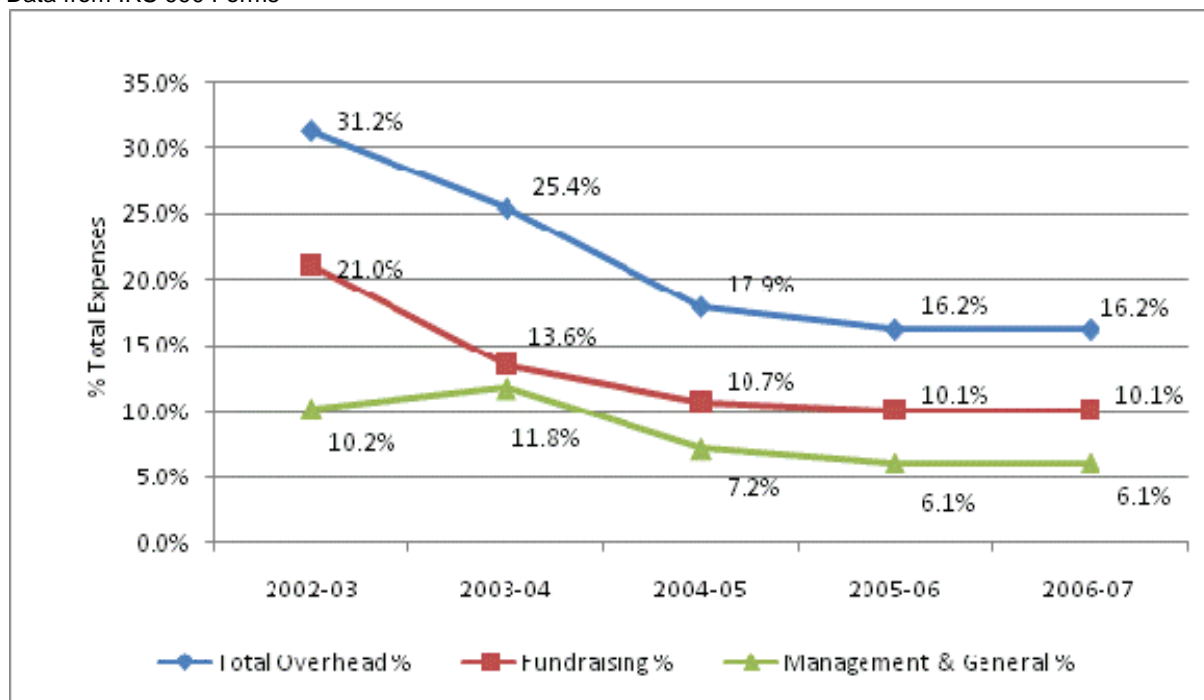
Thanks to Cornerstone Partners, who cover our operating expenses, every dollar you give goes to fund critical programs in our community. However, we think it's important for you to know that we work hard to keep costs as low as possible.

In the last fiscal year (ending June 30, 2007), United Way's operating cost was 16.2% percent. Of this, 10.1% was for fundraising and 6.1% for administrative costs, including processing of over 30,000 pledges.

Charity Navigator, the nation's largest evaluator of charities, gives United Way of the Columbia-Willamette a prestigious four-star rating for exceeding industry standards. Charity Navigator analyzes more than 5,000 nonprofit organizations annually.

United Way Overhead Trends

Data from IRS 990 Forms





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COMMUNITY IMPACT

Creating opportunities and lasting-changes by working together, helping people, making every contribution count.

United Way's Community Impact Model benefits donors by providing them with a partner who has expertise in identifying and prioritizing community needs, leveraging contributions, and ensuring accountability. We use a grant funding model that strategically invests in health and human service partners and projects that demonstrate collaboration, efficient and effective use of resources, and measurable results. About 75 well-trained volunteers and expert United Way staff work together to identify the best ways to solve issues in the four counties we serve. Our priority is funding programs related to the building blocks we all need to succeed: education, income, and health.

WHAT'S HAPPENING IN THE REGION

The four-county Portland/Vancouver region faces some serious challenges:

- Over 300,000 people in our region live in poverty
- One out of six people have no health insurance; 84% are members of working families
- One in five children entering kindergarten lacks the skills to learn successfully
- About one in 12 seniors in the four-county area lives below the Federal Poverty Line
- 47% of households receiving emergency food have at least one working member
- Almost a third of students entering ninth grade do not graduate from high school
- An estimated 10,000 people are homeless every night in our region
- 1 out of 8 people who are homeless were employed when they lost their housing
- Childcare for one toddler costs more than 50% of a minimum wage and is unaffordable for more than 1 out of 3 families
- A third of ninth graders will not complete high school
- 79% of people with disabilities report that they can and want to work; yet, 71% are unemployed.
- The average food stamp benefit is less than \$1 per person per meal
- 20 percent of seniors needing personal assistance are unable to find someone to help, either paid or voluntary



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UNITED WAY'S RESPONSE

United Way brings people, resources, and ideas together to tackle our community's toughest issues. We fund programs across all four counties in the metro area. We are different than other organizations because we address multiple issues related to poverty and work toward changing systems to prevent problems from happening in the first place. It's about prevention and investing now rather than paying later. Here are some examples of the type of programs we fund:

Education - Helping children and youth achieve their potential

- Improving access to quality, affordable childcare
- Kindergarten readiness
- Providing after-school and mentoring programs
- Connecting parents with resources and education

Income - Promoting financial stability and independence

- Helping people find and retain affordable housing
- Supporting seniors and people with disabilities to increase independence and safety
- Supporting workforce training and living wage employment
- Specialized services and support for homeless children and families.

Health - Improving people's health

- Increasing access to healthcare
- Providing mental health and addictions treatment
- Preventing domestic and family violence
- Services that prevent abuse and promote community inclusion for seniors and people with disabilities.
- Culturally specific health care access for communities of color

In addition, United Way provides funding to support diversity, volunteerism, and capacity development for non-profit organizations and 211 Info (the Northwest's largest information and referral call center). Last year United Way changed the lives of over 100,000 children, individuals, and families. For example, 2,800 seniors and people with disabilities received support that allowed them to remain independent and less isolated. Over 2,000 children received quality daycare, 732 youth participated in after-school tutoring and mentoring



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programs, almost 5,000 people who are uninsured got access to medical care, and almost 70,000 people were assisted through the 211 resource hotline. Behind each statistic is a real person whose life has been change. Together, we can do even more in the coming years.

For more information, ask for a copy of:

- Community Needs Assessment
- Funding Trends Analysis (details national, regional, local support for health and human services)
- Results Document [will be released early fall 2008]

**United Way.
Advancing the Common Good**

**CREATING THE OPPORTUNITIES FOR A
GOOD LIFE FOR ALL BY FOCUSING ON:**

EDUCATION

**HELPING CHILDREN & YOUTH
ACHIEVE THEIR POTENTIAL**

- Access to quality, affordable childcare
- After-school and mentoring programs
- Resources and education for parents

INCOME

**PROMOTING FINANCIAL
STABILITY AND
INDEPENDENCE**

- Affordable housing
- Services for seniors/disabled
- Job training/living wage employment

HEALTH

**IMPROVING
PEOPLE'S HEALTH**

- Access to healthcare
- Mental health and addictions treatment
- Domestic and family violence prevention