UNITED WAY OF SOUTHWEST VIRGINIA
EMPLOYEE CAMPAIGN COORDINATOR’S GUIDE
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OverView of united Way of southwest Virginia

Our cradle-to-career approach

early childhood
- Children are cared for in quality environments, ready for kindergarten, and equipped with the skills and supports necessary for learning and success.

Elementary
- Children are fed, engaged in healthy lifestyles, and reading all grades agreed by the end of 3rd grade.

Middle school
- Youth have goals, support, and a plan for the future, basic financial literacy, and knowledge about their health and well-being.

High school
- Youth gain hands-on career experience and complete high school with a plan to enter the workforce or pursue opportunities in post-secondary education or training.

Beyond
- Families are healthy, educated, and financially stable, and are contributing members of a workforce that invest in the community by giving, advocating, and volunteering.

United Way of Southwest Virginia fights for the health, education, and financial stability of every person in Southwest Virginia because they are the building blocks for a good quality of life. Through an initiative-based cradle-to-career approach, United Way of Southwest Virginia is creating sustainable solutions to address the challenges facing tomorrow’s workforce. United Way convenes cross-sector partners to make an impact on the most complex problems in our region. Through collaboration with government, business, nonprofit and individuals, United Way innovates for positive, lasting social change. With a footprint that covers nearly 20% of the state of Virginia, United Way of Southwest Virginia programs and initiatives serve the counties of Bland, Buchanan, Carroll, Dickenson, Floyd, Giles, Grayson, Lee, Montgomery, Pulaski, Russell, Scott, Smyth, Tazewell, Washington, Wise, and Wythe, and the cities of Bristol, Galax, Norton, and Radford.

Service area
Additional areas in which United Way of Southwest Virginia programs and initiatives are offered
YOU’RE MAKING AN IMPACT IN OUR COMMUNITY

The United Way campaign brings people together to address our community’s most important issues. As a United Way Employee Campaign Coordinator (ECC), you stand alongside thousands of other volunteers who are dedicated to making a measurable impact all across the community.

This handbook focuses on the role and responsibilities of the ECC. It is designed to provide you with information to guide you through. It offers you an overview. You’re not in this alone! The United Way staff is always available to provide you with additional support for your campaign.

Thank you for volunteering to be part of the annual United Way campaign. By giving your time and talent, and spreading the word, you are helping to advance the common good. That’s what it means to Live United.

WHAT DOES AN EMPLOYEE CAMPAIGN COORDINATOR DO?

An ECC creates a stronger community by planning, organizing and coordinating a successful United Way campaign within your workplace.

KEY RESPONSIBILITIES:

- Work closely with United Way of Southwest Virginia staff.
- Obtain support from top management.
- Develop an effective campaign plan including dates, goals and special activities.
- Coordinate your company’s kick-off, recognition and special events.
- Coordinate the distribution and collection of campaign materials.
- Request speakers from United Way.
- Recruit a team of volunteers to assist you.
- Promote the campaign and educate your co-workers about United Way.
- Invite everyone to give. Set an example by making a gift yourself.
- Make your workplace campaign fun!
- Complete your campaign envelope and schedule a pick-up time with United Way or send it with pledge forms to the United Way office by November 1, 2019.
- Thank your donors and volunteers.
- Evaluate and make recommendations for next year.
WHY UNITED WAY?

LOCAL
Your contribution STAYS in our community, supporting local programs focusing on health, education and financial stability, making United Way the best way to help the most people in Southwest Virginia.

PROVEN
United Way is a proven, organized system that continuously evaluates our programs and partnerships to meet community needs.

ACCOUNTABLE
United Way of Southwest Virginia Board of Directors is comprised of local business and civic leaders from throughout the community. Members provide leadership for vision and overall direction, approve the annual plan, set goals and outcomes, monitor progress, and have a fiduciary responsibility for the programmatic and fiscal integrity of the organization.

EFFICIENT
Through the extensive use of community volunteers like you, United Way of Southwest Virginia is able to ensure your investment goes where it has the greatest impact.
WHAT DOES IT MEAN TO LIVE UNITED?

FIGHTING FOR TOMORROW’S WORKFORCE

There is a gap between the worlds of learning and work in Southwest Virginia. What’s needed is a true “cradle-to-career” continuum: a talent pipeline that prepares the next generation for the jobs of tomorrow, supplies businesses with skilled workers, and builds a robust, competitive economy.

Through an initiative-based, cradle-to-career approach using sustainable solutions, United Way of Southwest Virginia brings partners together to fight for a healthy, educated, and financially stable workforce of tomorrow.

WHY WE DO IT

Southwest Virginia is at a critical crossroads. Population decline over the past two decades has depleted our workforce. Losing workers has stressed our local economy, constantly reducing the resources we have to build our children’s skills. Because of this, United Way of Southwest Virginia is investing in the emerging workforce. We invite community members to unite in partnership to plan and work together, giving power to our entire region to build our ideal workforce of tomorrow. Together, we can break the cycle of unemployment, poverty, and population decline. United Way of Southwest Virginia is creating a healthy, well-educated, economically mobile workforce by making focused investments in children and youth to retain their talent, energy, and love for this region by preparing them for jobs here at home.

WHAT WE DO

United we fight. United we win. United Way of Southwest Virginia fights for the health, education and financial stability of every person in our region because they are the building blocks for a good quality of life. We win by living United. By forging unlikely partnerships. By finding new solutions to old problems. By mobilizing the best resources. And by inspiring individuals to join the fight against our community’s most daunting social crises. We are more than fundraisers. We are hand-raisers. Game-changers.
CAMPAIGN BASICS: FIVE STRATEGIES FOR SUCCESS

1. AFFIRM TOP MANAGEMENT SUPPORT
   • Gain approval for recruiting a campaign committee and holding campaign meetings and activities on company time.
   • Ask for visible support from company leadership during the campaign.
   • Discuss strategies for corporate support, i.e. corporate gift/match.
   • Discuss options for engaging senior staff through a focused leadership campaign.
   • Discuss options for incentives that can be used to encourage participation and increased giving.

2. RECRUIT A CAMPAIGN COMMITTEE
   • Recruit a diverse team that includes people from different departments and levels (i.e., management, administrative, etc.) within the company.
   • Invite both new and previously involved committee members to participate.
   • Set a schedule of committee meetings and distribute to members.

3. DEVELOP A CAMPAIGN PLAN
   • Invite your United Way representative to your campaign planning meetings to answer questions and offer ideas. Discuss campaign strategies that fit within the company culture.
   • Work with your United Way representative to arrange for delivery of all your campaign materials.
   • Determine the campaign timeline including the pledging timeframe and any presentations and activities that will be taking place.
   • Outline campaign activities and determine which team members will be responsible for implementing them, including organizing the campaign kickoff, distributing and collecting pledge forms, special events, securing incentives, etc.
   • Evaluate past results and identify areas where potential for increases may exist- dollars raised, participation, etc. and set a campaign goal that focuses on these areas.
4. IMPLEMENT THE CAMPAIGN PLAN

PROMOTE THE CAMPAIGN

- Place information (posters, flyers, etc.) in high traffic areas around your office such as entry ways and break rooms in the weeks leading up to the kickoff so employees have an opportunity to learn about United Way.
- Use multiple methods of communication to inform people about the campaign: post information on your intranet, announce the campaign at staff meetings, use payroll stuffers, etc.

HOLD THE CAMPAIGN KICKOFF

- Start the campaign with your company’s leadership team and campaign committee a week prior to the general kickoff.
- Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, timeframe, activities and incentives.
- Invite a member of the leadership team to the general kickoff meeting(s) to communicate management support of the campaign.
- Invite your United Way representative to speak at the meeting(s).

MAKE THE ASK

- Make sure that everyone is given the opportunity to make a contribution to the campaign. Use the campaign kickoff, department meetings and one-on-one conversations to encourage participation. The number one reason people say they didn’t give is because they weren’t asked!
- Personally distribute and collect pledge forms. Ask everyone to return their pledge form, even if they choose not to give.
- Be prepared to answer questions about United Way. Many commonly asked questions are answered in this guide, and your United Way representative can answer any other questions employees may have.
- Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference.
- Inform employees about opportunities such as United Way’s Leadership Societies and Volunteer Projects.
- Send out reminders to encourage people to turn in their pledges.
- Keep a running total of dollars raised as pledges are collected.
- Provide regular updates to employees- send out email blasts, post in breakrooms, etc.
- Make personal follow-ups with individuals who have not turned in their pledge as the campaign nears the end.
WRAP-UP THE CAMPAIGN

- Ensure all pledges are turned in. Collect payment for those who opted to make a one-time gift with a check or cash.
- Schedule a meeting with your United Way representative to finalize the campaign- pick up the campaign envelope, extra campaign supplies, etc.
- Report your final campaign results to employees and leadership.
- Thank everyone! Send thank you emails, ask the CEO for a thank you message to communicate to employees, and hang thank you posters. Don’t forget to thank the committee for all their help!
- Hold a final campaign committee meeting to evaluate your efforts and make recommendations for next year.

5. YEAR-ROUND ENGAGEMENT

- Sign up for our e-newsletter to stay up-to-date on what’s going on at United Way.
- Share United Way updates and news with employees on a regular basis throughout the year so they can see the impact of their contributions.
- Organize group volunteer projects for employees and provide information about opportunities they can take advantage of on their own.
- Integrate United Way into your onboarding process to engage new employees outside of campaign season and allow retirees to continue their involvement.
United Way of Southwest Virginia fights for the health, education and financial stability of every person in Southwest Virginia because they are the building blocks for a good quality of life. Through an initiative-based cradle-to-career approach, United Way of Southwest Virginia is creating sustainable solutions to address the challenges facing tomorrow’s workforce. United Way convenes cross-sector partners to make an impact on the most complex problems in our region. Through collaboration with government, business, nonprofit and individuals, United Way innovates for positive, lasting social change.

With a footprint that covers nearly 20% of the state of Virginia, United Way of Southwest Virginia programs and initiatives serve the counties of Bland, Buchanan, Carroll, Dickenson, Floyd, Giles, Grayson, Lee, Montgomery, Pulaski, Russell, Scott, Smyth, Tazewell, Washington, Wise, and Wythe, and the cities of Bristol, Galax, Norton, and Radford.
PUT THE FUN IN FUNDRAISING

Motivating your co-workers doesn’t have to be expensive. Many businesses are working on tight budgets and allow campaign coordinators to be creative in what they do with their campaign. These are just suggestions in getting started. All businesses are different and some may base entry to events upon dollars donated, participation, new donor or increasing an existing gift. Regardless of which method you chose, remember, you know your co-workers better than anyone so you know what would motivate them.

INCENTIVES

- Reserved parking spot
- Jeans day/Casual dress
- Paid time off
- Gift Cards
- Job Trades – Let the Boss do your job
- Day off on Birthday
- Sleep-in/Leave Early passes
- Company Logo items
- CEO car wash
- Pizza Party
- Extra lunch time
- Sporting event tickets
- Weekend at B&B, hotel or resort

SPECIAL EVENTS

- Throw a pie/Dunk your boss
- Ugly Earring/Tie Contest
- Breakfast bash/Pizza party/Root beer floats
- Craft/Bake Sale
- Pancake Breakfast
- Baby picture contest
- Yard Sale
- Collect loose change around the office
- Car Wash
- Auction baskets from each department
- Office Treasure Hunt
- Lunchtime movie with popcorn
- Chili Cook-Off
- Indoor golf course
- Employee Cookbook Sale
CAMPAIGN ENHANCERS

RESOURCES
At http://unitedwayswva.org/campaign-toolkit/ you can find videos, stories, forms, and more.

SPEAKERS
United Way staff are available to come speak to your groups and participate in your events. Just let us know when, and we will be there. Please schedule this as far in advance as possible.

20 MINUTE AGENDA FOR CAMPAIGN PRESENTATION

2 MINUTES – WELCOME
Campaign Coordinator welcomes employees and explains why United Way is important and how the company will support the campaign.

2 MINUTES – ENDORSEMENT
Company CEO provides statement of support, emphasizing the value to the company of community involvement. This establishes a corporate commitment to United Way and encourages companywide participation.

2 MINUTES – UNITED WAY STAFF
United Way Staff provide an overview of United Way and the impact of its services. This informs the audience of the needs in our community and offers them the opportunity to participate in addressing those needs.

5-8 MINUTES – UNITED WAY STORY AND/OR VIDEO
A speaker from a United Way agency illustrates how employee contributions are making a difference in our community. Campaign Video raises the audience’s awareness and encourages them to actively support their community by giving through the United Way Campaign.

5 MINUTES – WRAP UP & THANK YOU
Campaign Coordinator describes incentives, answers questions, asks employees to complete pledge forms, collects pledge forms, and thanks everyone.
DEAR TEAM,

Thank you for all of your hard work on behalf of INSERT COMPANY/ORGANIZATION NAME. I’m so proud of how generous our employees are in giving to our community each year though our United Way campaign. Because of the support you consistently give United Way, lives are changed every day.

United Way of Southwest Virginia fights for the health, education and financial stability of every person in Southwest Virginia because they are the building blocks for a good quality of life. Through an initiative-based cradle-to-career approach, United Way of Southwest Virginia has engaged more than 30,000 middle and high school students through their Youth Success program to create a talent pipeline that prepares this next generation for the jobs of tomorrow. In 2018, with support from our community and hundreds of volunteers, United Way of Southwest Virginia provided over 200,000 free weekend meals to at-risk students so they can come to school on Monday ready to learn. Over 5,500 children were served by 130 day care providers trained through Virginia Quality. VITA, the Volunteer Income Tax Assistance program, helped to return $3.5 million to people in Southwest Virginia and another $500,000 was saved on prescriptions through United Way’s FamilyWize partnership.

You can learn more about United Way of Southwest Virginia by checking out their website at unitedwayswva.org. Thank you for those who have already joined me in supporting United Way through a payroll deduction donation. Every little bit helps. If you have not made a gift to United Way of Southwest Virginia, will you join me by donating today?

This is what it means to LIVE UNITED,
CEO NAME
PLEDGE PROCESSING

STEP 1 Collect a pledge form from each employee.

STEP 2 Make sure all pledge forms are accounted for, signed by the employee, and properly completed. Company Payroll Department will keep the yellow payroll copy, donor will keep pink donor copy, and submit the white (original) copy in the United Way Campaign Report Envelope.
   - Most payroll deductions begin the first pay period in January and continue through December 31. The deduction is set up like any other deduction for benefits.

STEP 3 Summarize the results on the United Way Campaign Report Envelope.

STEP 4 Return your United Way Campaign Report Envelope and all forms (with any cash and check gifts collected) to United Way. Please contact the Community Relations Department at the United Way office at 276-628-2160 to arrange a pick up.

STEP 5 The United Way Community Relations Team will audit/process the envelope and contact you with any questions.
   - Payments should be mailed to:
     United Way of Southwest Virginia
     P.O. Box 644
     Abingdon, VA 24212
TIPS ON HANDLING OBJECTIONS

Often, people find getting started the most difficult step in conducting a campaign because they feel uncomfortable asking for monetary support. Your potential donors may have questions or concerns regarding the United Way or your campaign. Being open and honest about both is the best method when responding to objections. Keep in mind that the money you raise will be used to improve the lives of many, right here in our community.

TIPS

- Listen carefully to what is said. Sympathize by saying “I can understand or appreciate how you feel”. This doesn’t necessarily mean you agree.
- Answer all questions directly, openly and honestly.
- Be open, not defensive. A concern is never directed at you; it is directed at some idea you are presenting.
- Don’t argue. If you argue with someone’s statement, you will force the person to become defensive. Remember, you want to address a concern, not win an argument.
- Be relaxed, be yourself. Your job is to make a case for supporting your community through United Way of Southwest Virginia.
- Be prepared. Review the frequently asked questions section.
- Never answer the objection like a know-it-all, don’t try to win the point.
- If you don’t know the answer, don’t fake it. Assure the person you will find out the answer and then get back to them. Call a United Way staff member for assistance.
COMMON OBJECTIONS

In conducting a campaign, most objections or hesitations in giving is based upon a misconception. Providing the correct information usually assists in overcoming the objection and clarifying the misconception, which may result in a pledge or plant the seeds for future years. Some common objections are:

OBJECTION: “Administrative and fundraising costs are too high.”
RESPONSE: According to the Better Business Bureau 35% is acceptable for non-profits in regards to overhead costs. United Way of Southwest Virginia prides itself with keeping overhead costs to 14%. That means less than 14 cents of every dollar raised is spent on fundraising and year-round monitoring to ensure the contributions are being used effectively.

OBJECTION: “I didn’t get a raise; how am I supposed to increase my gift?”
RESPONSE: Always acknowledge the person’s circumstances. All you can do is ask that they evaluate their situation and give at the capacity they are able to. No amount is too little to make a great impact.

OBJECTION: “You’re not a local organization.”
RESPONSE: Every United Way is local and independent. We have a local Board of Directors, with local volunteers making decisions on all aspects of the use of funds. There is also an independent audit conducted yearly to ensure funds are used to adequately and all of the dollars being used to the greatest impact. You can access their latest financial statement on their website at www.unitedwayswva.org.

OBJECTION: “You don’t support direct services like food banks or animal shelters.”
RESPONSE: United Way of Southwest Virginia has shifted from symptom treatment to addressing root causes to carry out the important yet difficult work to improve the health, education and financial stability of every person in every community in Southwest Virginia.

REMEMBER...GIVING IS A VOLUNTARY DECISION.

When asking employees to donate, remember that giving is always voluntary! Investing in the community is a personal decision, and you can expect some employees you solicit to object to some part of United Way or the campaign. These are natural parts of the solicitation process, so you should regard them as welcome signals that you are doing your job. Remember, not everyone is going to participate, no matter how fun and informative you make your campaign!
FREQUENTLY ASKED QUESTIONS

WHAT IS UNITED WAY?

• United Way is a local community movement of volunteers, program partners, corporate partners and donors, committed to advancing the common good by focusing on education, health and financial stability.

WHO IS SERVED BY UNITED WAY OF SOUTHWEST VIRGINIA?

• A community impact organization, United Way of Southwest Virginia’s initiative-based cradle-to-career approach is creating sustainable solutions to address the challenges facing tomorrow’s workforce.

• Your United Way is committed to providing services to ensure every person has access to the building blocks for a good life:
  o Education – preparing children to enter and graduate from school
  o Financial Stability – promoting financial stability and workforce development
  o Health – improving people’s health and wellness

WHAT’S THE DIFFERENCE BETWEEN GIVING TO UNITED WAY VS. ANOTHER CHARITY?

• When you give to a specific charity, you support a cause. When you give to United Way, your gift becomes part of a collective effort: to improve lives and strengthen our entire community.

IF I DON’T BENEFIT, WHY SHOULD I GIVE?

• You or a family member may have already used a United Way funded program or partner without realizing it. In fact, people from all backgrounds benefit from youth mentoring programs, school-based child nutrition and education programs, job training programs, and other services provided by United Way initiatives and investments.

WHO DETERMINES HOW CONTRIBUTIONS TO UNITED WAY ARE SPENT?

• The United Way of Southwest Virginia Board of Directors carefully screens and selects the programs funded by your contribution. After selection, these programs are closely monitored to make sure they produce positive, measurable results.
WHO RUNS UNITED WAY?
- Your local United Way of Southwest Virginia staff work in partnership with knowledgeable, well-trained volunteers who represent the diversity of the community. A volunteer Board of Directors sets policy and strategic direction, oversees financial practices, and provides guidance on operational issues.

HOW MUCH OF MY GIFT IS USED FOR OVERHEAD?
- United Way’s Corporate Partners help to offset operational costs such as: campaign materials, events and administrative costs, therefore devoting more donor dollars to local health and human service programs. Our administration and fundraising overhead is only 14 cents per dollar, far more efficient than the 35 cents recognized by the Better Business Bureau’s Wise Giving Alliance, the 25 cents recognized by the USA Office of Personnel Management, or the 20 cents measure which earns the highest ratings by other charity watchdog groups.

IS MY GIFT TAX DEDUCTIBLE?
- United Way of Southwest Virginia is a nonprofit 501 (c)(3) eligible to receive tax deductible gifts. You should discuss the tax deductibility of your gift with a tax professional.

HOW IS MY LOCAL UNITED WAY RELATED TO UNITED WAY WORLDWIDE AND OTHER UNITED WAYS?
- United Way Worldwide is the leadership and support organization for the network of nearly 1,800 community-based United Ways in 45 countries and territories. It provides support through guidance, training, development services, research and national advertising. However, UWW has no input on how a local United Way invests contributions in its community.

- In exchange for these services, United Way of Southwest Virginia makes an annual payment to UWW that is equal to one percent of the dollars raised annually, and the cost of this covered by our Corporate Partners. This means that 100% of your gift stays here locally.

HOW DO I VOLUNTEER?
- To volunteer in your community, visit our website at unitedwayswva.org and click on “Volunteer” or simply call the United Way office at 276-628-2160.
MARY ANNE HOLBROOK

Mary Anne joined the United Way team in May 2016 and currently serves as United Way’s Director of Community Relations. With a background in non-profit fundraising and management and education, Mary Anne helps build and sustain resources for our community initiatives. She has worked in all facets of fundraising including donor development and stewardship, grant writing, governmental relations and events. Mary Anne helped launch new graduate medical education programs at Johnston Memorial Hospital that address regional physician shortages and workforce needs by training physicians in this region who will stay in the region. A graduate of Radford University, Mary Anne holds a Master’s Degree in English with concentrations in Appalachian Studies and Business and Technical Writing. Mary Anne lives in Washington County, Virginia with her husband, Jon, and their children.

DEBBIE MCCROSKEY

Debbie McCroskey is a native of Washington County, Virginia and earned a Bachelor of Science degree in Business Administration and Marketing from Milligan College. Debbie also attended the University of Tennessee School of Law. She has over 20 years of experience in business development specializing in the cultivation and advancement of partnership initiatives. While with GE Healthcare, Debbie oversaw the application of strategic channel marketing distribution and partnership plans for GE’s cardiovascular imaging systems in the Southeastern region of The United States. Most recently, in her role as Director of Corporate and Government Relations for Barter Theatre, she successfully increased their 2018 sponsorship level by 18% through the introduction of corporate awareness initiatives.
SHAUNA TILSON

Shauna Tilson joined the team in August 2017 as Community Relations Coordinator. Shauna was born and raised in Southwest Virginia, received her Associate’s Degree with a major in Education from Virginia Highlands Community College in 2013 and her Bachelor’s Degree with a double major in Political Science and History from Emory & Henry College in 2016. Shauna is currently pursuing her Master of Public Administration Degree at Old Dominion University. Shauna has worked with multiple nonprofit organizations, including Sprouting Hope Community Garden and Appalachian Community Fund, and co-founded the organization A Reason to Play in 2013. Prior to joining our team, she worked as the Program Assistant at the Southwest Virginia Alliance for Manufacturing. Shauna resides in Abingdon with her husband, Dustin, and daughter, Tilly Wren.

JENNIFER KETCHUM

Jennifer joined the team in March 2018 as Community Relations Assistant. Previously, she worked for Boise Cascade/OfficeMax for 17 years, where she was responsible for data entry, sales support, contract maintenance, account set up, reporting, quality control, and customer service. She held the position of administrative assistant for the Vice President of Student Life and Dean of Students at Emory & Henry College, where she enjoyed supporting many of the different departments on campus from academics to athletics. During her time on staff at UVA-Wise, she supported the Business Economics and Psychology Department. Her most recent position was Executive Assistant for the Southwest Virginia Advanced Manufacturing Center of Excellence in Abingdon. She has an Associate Degree in Legal Assisting through Virginia Highlands Community College. Today, Jennifer resides in Abingdon with her husband Kevin, two children Austin and Sydney, and multiple pets.
CONTACT INFO

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CORPORATE PARTNERS

United Way of Southwest Virginia