

BEST PRACTICES FOR RUNNING A SUCCESSFUL CAMPAIGN

BEFORE YOUR CAMPAIGN

- Meet with a United Way staff member or Loaned Executive to create a plan of action. If you don't know your United Way representative, we would be happy to introduce you. Please call us at 561.375.6600.
- Meet with your CEO or management team to establish goals and dates and to determine how you will involve them in the campaign.
- If your organization has a union partner, include a representative in the planning process.
- Recruit a strong campaign team, "ambassadors" representing a wide range of employees, for help and support.
- Ask a member of senior management to chair your leadership giving efforts.
- Review last year's campaign results, strategies, and recommendations.
- Develop strategies, a timeline, and goals for this year's campaign.
- Reserve room(s) for group meetings and/or special events.
- Visit UnitedWayPBC.org to order your materials, arrange a speaker, and more. Be sure to order your campaign materials and arrange for speakers at least two weeks prior to your kickoff date.
- Consider offering incentives for various levels of giving.
- Develop a communications plan leading up to the campaign to educate, build enthusiasm, and inform your coworkers of key dates/goals.
- Post information on your organization's intranet with a link to UnitedWayPBC.org
- Send out endorsement letters, videos or emails from your CEO.

DURING YOUR CAMPAIGN

- Hold employee group meetings. (See "The 20-Minute Group Meeting.")
- Run a special solicitation for current or prospective Leadership donors (those who do or might consider giving \$1,000 or more per year).
- Share campaign information and progress in newsletters, intranet and email.
- Use posters, table tents and other items to advertise the campaign.
- Follow up with anyone who has not turned in a pledge form. Ask everyone to return a pledge form whether they are contributing or not.
- Promote Affinity groups.

AFTER YOUR CAMPAIGN

- Complete the contribution report envelope and return it to your United Way representative.
- Send out thank you notes and/or hold a thank you event to announce and celebrate results. Don't forget to thank anyone who helped you coordinate the campaign.
- Submit your "Best Of" awards entry form.
- Donor detail

ALL YEAR

- Schedule a volunteer day or a Day of Caring for your coworkers.
- Keep your employees educated about United Way's work. Call us to arrange a lunch and learn, a speaker, or a bus tour. Subscribe to our e-newsletter at UnitedWayPBC.org
- Contact us any time with questions about how we can work together to ensure everyone has access to the basics!
- Follow us on Facebook and Twitter!

Trustworthy. Efficient. A Champion.

EMPLOYEE CAMPAIGN COORDINATOR TOOLKIT



MY CAMPAIGN DETAILS

My Name _____

My United Way Staff Contact Info

Name _____

Email _____

Phone _____



My Campaign Dates _____

My Campaign Team Members

Our Goal(s) _____

Thank you for taking on this very important leadership role!



As a United Way Employee Campaign Coordinator (ECC), you play a key role in advancing the common good. With each pledge your coworkers make to United Way, you help to ensure academic success for children, financial stability for families and access to health care for all. As the ECC for your organization's United Way campaign, you join a large force of dedicated volunteers committed to raising money and helping our community.

Thank you in advance for your time!

WE'RE HERE TO HELP YOU RUN A SUCCESSFUL CAMPAIGN!

Please visit UnitedWayPBC.org for resources and more information. You can order your materials, download templates and logos, watch the video, arrange for a speaker, and more!

BEST PRACTICES: THE 20-MINUTE GROUP MEETING

ITEM	PRESENTER	MIN.
Opening remarks.....	Campaign coordinator	2
CEO endorsement.....	CEO/manager.....	2
Campaign overview	United Way staff	3
Campaign video	5
Speaker	Program representative	4
Make the ask	United Way representative	2
Closing comments	Campaign coordinator	2

GET CONNECTED.

UnitedWayPBC.org



UNITEDWAYPBC



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#UnitedWeWin

You're invited to join us on our bold journey; one that connects donors and resources to local nonprofits offering crucial programs. Focused on the fundamentals for a good life – education, financial stability and healthy living – we invest donors' dollars in quality programs that provide our community with access to the tools required to thrive. From promoting access to education and health care to ending hunger and homelessness, we're strategic with our donors' dollars.

THREE QUICK REASONS

- 1 OUR COMMUNITY IMPACT TEAM** has the expertise to identify and address our community's most critical needs. By funding 53 nonprofit partners offering 86 programs and collaborating with community partners, we truly advance the common good and make a visible difference in the lives of our residents.
- 2 OUR COMMUNITY PARTNERS PROVIDE PROGRAMS** that...
 - Assist youth in gaining skills to achieve their full potential in school and life.
 - Help those in crisis meet their most basic needs— food, shelter and clothing.
 - Prepare individuals and their families to become financially stable.
 - Connect residents with available, affordable health services.
- 3 WE MAKE DONORS' DOLLARS MORE IMPACTFUL** by directing donations to the successful nonprofit organizations of their choosing. Combined with grants and matching dollars, your gift will be stretched to help the most people, right here in Palm Beach County.



HARD TO BELIEVE, BUT TRUE!

PALM BEACH COUNTY FACTS

- More than **200,000 Palm Beach County residents** don't know where their next meal will come from.
- If **students are not reading on level** by third grade, their risk of **not graduating on time**, or at all, increases significantly.
- The unemployment rate for **individuals with disabilities** is much higher than the national average, **making it difficult to achieve independence.**
- **Local seniors** are often faced with the decision to **buy food OR pay for their medication.**
- **At risk youth** who do not participate in a mentor match are **54% more likely to use drugs.**
- **41% of residents** are just **one household emergency away from being sent into a financial crisis** where they will need help keeping a roof over their heads or putting food on their tables.

It's easy to give to United Way through payroll deduction!

NEED MORE INFORMATION?
WE'RE HERE TO HELP! Call us at 561.375.6600