



United Way
of Palm Beach County

EMPLOYEE CAMPAIGN COORDINATOR *Toolkit*

*Thank you for helping build a brighter future
for our community.*



#UnitedForPBC

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.

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 youth succeed, stabilize families, and empower healthy lives. 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.

THREE REASONS TO GIVE TO UNITED WAY

1 OUR COMMUNITY INVESTMENT TEAM

We have the expertise to identify and address our community's most critical needs. By funding 60 nonprofit partners and over 110 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 UNITED WAY MAKES DONORS' DOLLARS MORE IMPACTFUL

We fund local critical programs with proven outcomes. Combined with grants and matching dollars, your gift will impact people right here in Palm Beach County.

HARD TO BELIEVE, BUT TRUE!

PALM BEACH COUNTY FACTS

- 181,340 Palm Beach County residents struggle to put food on the table.
- 52,580 PBC children are food insecure.
- 1,050 youth are on a waitlist to be matched with a mentor.
- At-risk youth who participate in a mentor match are 52% less likely to skip a day of school and 55% more likely to be enrolled in college.
- 46% of PBC 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.





MAKE IT S.O.C.I.A.L.

S SHORT & SWEET

Keep campaign messaging short and sweet to get people's attention and maximize impact.

O OVERALL GOALS

Clearly state your goals - dollars raised, number of participants, average donation, volunteer hours.

C COMMUNICATE

A picture is worth a thousand words! Use photos or videos when possible in your communication and storytelling. This helps connect people to the mission.

I IMPACT

Maximize your campaign impact by engaging in what United Way is doing in the community. Connect people to the mission through volunteer projects, impact videos, agency speakers, and partner agency tours. Get creative and offer a mix of virtual and in-person opportunities!

A ACCELERATE SUCCESS

Engagement opportunities provide a great way to accelerate success. Competitions, trivia, raffles, etc. are a great way to keep people connected. Be creative! Your United Way Relationship Manager can help you develop new ideas and opportunities for engagement.

L LIVE UPDATES ON GOALS

Celebrate your wins! Keep momentum going by celebrating daily wins and keeping the progress of the campaign at the top of all communication.



BEST PRACTICES FOR A SUCCESSFUL CAMPAIGN

BEFORE YOUR CAMPAIGN

- Meet with your United Way Relationship Manager to create a plan of action and develop strategies. They will work with you throughout the campaign process.
- Meet with your CEO or executive management team to establish goals and dates and to determine how they will be involved throughout the campaign.
- If your organization has a union partner, include a representative in the planning process.
- Consider using our electronic pledging system to streamline pledges, progress, and reports into one quick and easy platform. Ask your UW Relationship Manager if you are interested.
- 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.
- Analyze your workplace environment, technological capabilities, and available platforms to best identify and develop communication channels to engage employees.
- Develop a communications plan. Consolidate and coordinate outgoing messages to maximize your impact and avoid overwhelming employees.
- Post information on your organization's intranet with a link to UnitedWayPBC.org

DURING YOUR CAMPAIGN

- Host a virtual kick-off, whether virtually or in-person (see [Running a Virtual Campaign Kick-Off](#) for more info).
- Show the impact of United Way and your company's support through videos and stories. Record a video of a senior executive or share some of our United Way Impact Videos.

DURING YOUR CAMPAIGN CONT.

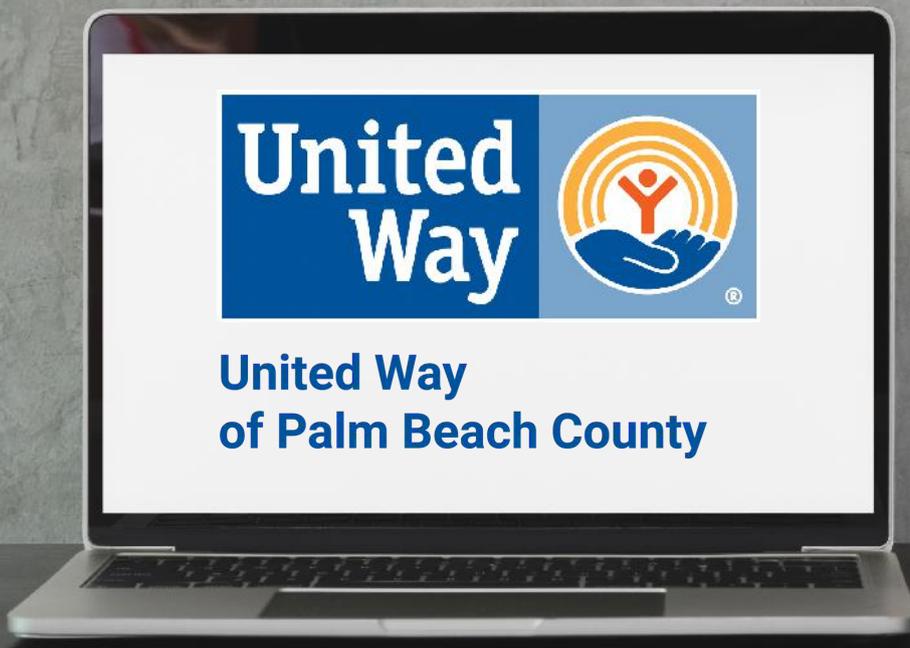
- Create events to promote the campaign and engage with employees. Have a raffle, lunch-and-learn, volunteer activity, or friendly competition. Brainstorm with your UW Relationship Manager to come up with events, virtual or in-person, that fit your work environment and campaign.
- Promote different giving incentives such as paid time off, lunch with a boss, or other rewards and raffle items.
- Encourage giving at a leadership level (\$1000 or more per year, \$250 or more per year for young professionals) to enter into affinity groups. This is a great way to give back, stay engaged, and network with like-minded individuals.

AFTER YOUR CAMPAIGN

- Meet with your UW Relationship Manager to capture campaign report information.
- Send a thank you from your CEO, Employee Campaign Coordinator, or other team members.
- Send personal thank you notes to each of your campaign committee members.
- Host a thank you event for leadership donors.
- Publicize results and reiterate the impact of gifts via your company newsletter, email, or intranet.

ALL YEAR

- Keep your employees educated about United Way's work. Contact your UW Relationship Manager to schedule a speaker, lunch-and-learn, volunteer event, or visit our website to stay updated with the latest content and resources.
- Follow us on Facebook, Instagram, and Twitter @unitedwaypbc and subscribe to our e-newsletter at UnitedWayPBC.org
- Contact us anytime with questions about how we can work together to ensure everyone has access to the basics!



RUNNING A VIRTUAL CAMPAIGN KICK-OFF

As you begin your United Way workplace campaign, a virtual kick-off has many benefits.

Ready, Set, Go!

A virtual kick-off clearly marks the start of your United Way campaign, creating a sense of urgency and timeline for colleagues. Campaigns with kick-off events have proven to raise more dollars in support of our community!

Inspiration

The kick-off provides employees with an opportunity to hear about the impact of their donations and be inspired, so they can make an informed decision about giving.

Team Building

This is a great chance to bring employees together in a common cause of caring and build morale, which is especially important in a time of social distancing.

Stage Setting

It demonstrates the passion of your organization, your senior management team, and your colleagues have for the campaign and supporting our community.

Your United Way Relationship Manager is here to support you and can help you plan and customize your kick-off event. We have created tools and resources to support you in hosting your kick-off virtually.



HOW TO GET STARTED

Technology Platform

Confirm the online web conferencing platform that is approved by your workplace and learn about the platform's functionality, so that your United Way Relationship Manager can help you build your kick-off agenda and activities on the platform. If you cannot host your kick-off on your own technology platform, speak to your UW Relationship Manager.

Senior Management Support

Support from your Executives is critical to showing that your organization is behind the campaign. Book their time so they can participate in your virtual kick-off, or see if there may be existing meetings you can piggyback on. See our Suggested Talking Point page for examples and presentation content that your senior management team can personalize.

Consider Your Audience

For best results, we recommend a kick-off event is scheduled for 30 minutes to 1 hour. If your employee base is large, you may consider hosting a series of kick offs throughout the day, or across a few days. While you want to reach all your employees, it may be helpful to strike a balance between reach and helping people be comfortable enough to ask questions and interact.

Determine the Meeting Host and Other Company Speakers

It is best if the Employee Campaign Coordinator (ECC) acts as a facilitator to ensure your kick-off sticks to the agenda. If the ECC needs support, your UW Relationship Manager can act as co-host. Invite your CEO or other executive(s) to take part and speak or record a video, as their leadership can inspire others and demonstrate support of United Way from the top down. See if there is someone in your organization that has experience working with or benefiting from United Way's services that would be willing to share their story. Peer-to-peer engagement is powerful!

Make It Interactive

Consider interactive activities like online polls or quizzes to keep their attention online or include trivia and opportunities to win prizes in-person. Your UW Relationship Manager can help you build this activity.

Raise Awareness about Impact

United Way has resources and opportunities to help display the impact in our community and engage employees such as campaign and impact videos, posters and brochures, tours, agency speakers, fundraising activities, and volunteer opportunities.

Set Clear Action Steps

Let people know how they can donate and/or how they can get involved in the campaign. We recommend sending your donation link immediately following your kick-off event, so people can take action while they're feeling inspired.

RECOMMENDED AGENDA

We welcome you to make use of the following template agenda as you plan your event.

Virtual Meeting Login Details:_____

OPENING 5-10 mins

.....
Time: XXX am/pm
CEO/ECC/Sr. Leaders

- Welcome
- Value of UW and Company partnership
- Importance of United Way now
- Encourage all to get involved with campaign activities
- Icebreaker Activity

UNITED WAY AWARENESS 7-15 mins

.....
Facilitated by United Way

- United Way Relationship Manager presentation
- United Way Impact Videos
- UW & Company Quiz
- etc.

CLOSING REMARKS 7-15 mins

.....
CEO/ECC/Sr. Management

- CEO/ECC to thank participants and reiterate importance of United Way
- Call to action/donate now
- Share company fundraising/ participation goals
- How to give
- Instructions on next steps - donation link to come, who to contact with questions, etc.

SUGGESTED SCRIPT

The below can be customized/personalized to meet the needs of the speaker(s) at your virtual kick-off.

Opening Remarks

- Welcome attendees, and thank them for joining the call
- My name is....
- Before we begin, I would like to welcome (introduce your UW Relationship Manager)
- As many of you know, I am a strong believer of United Way's work and I am proud to be a part of [COMPANY'S] United Way Campaign.
- We all know that poverty is very real in our community - 46% of PBC households can't afford the basic cost of living. United Way's role in our community is extremely important to help connect our most vulnerable community members to critical resources.
- What inspires me is that as a community, we have all pulled together and looked to how we could help our neighbors. Everyone continues to step up and give what they can to help ensure that people in our community have access to the basics.
- Even as we establish our "new normal," many individuals and families in our community continue to need help with food, housing, health care, educational supports, and more.
- We still see that 181,000 residents are struggling to put food on their tables, thousands of families lack affordable housing, and thousands of students in low-income areas lack access to technology to succeed in school.
- That is why we partner with United Way; they are the connector in our community - helping people and families feel connected to resources that give them help and hope.
- I want to take a moment to thank each and every one of you for being the heart of our community and a Champion for United Way year after year. Our collective commitment demonstrates [COMPANY'S] leadership in communities across Palm Beach County [or your grander company market], raising over \$X for United Way. [KEY POINT ABOUT LAST YEAR'S CAMPAIGN - your UW Relationship Manager can help provide information if needed]
- IF THE SPEAKER HAS A PERSONAL STORY ABOUT UNITED WAY OR SOMETHING THEY HAVE EXPERIENCED, ADD HERE.
- Thank you again for your personal leadership and generous support of United Way and our neighbors in need.
- Introduce the next section of the event.

SUGGESTED SCRIPT

The below can be customized/personalized to meet the needs of the speaker(s) at your virtual kick-off.

CLOSING REMARKS

- Thank you [UW Speaker] for joining us today and speaking. United Way plays such an important role in our community by stabilizing families, helping youth succeed, and empowering healthy lives.
- Our annual United Way campaign starts on [DATE]. We have an amazing team that has worked hard to make this year's campaign even better. Thank you, [CAMPAIGN VOLUNTEERS] for your leadership in the campaign.
- [SHARE NEXT STEPS FOR HOW PEOPLE CAN GET INVOLVED IN THE CAMPAIGN -i.e. pledge information, upcoming campaign activities, etc.]
- We invite you to engage in United Way events this week which will help you SEE a Stronger Community through United Way's mission, FEEL Connected to Long-term Solutions, and BE a Champion for our Community.
- Thank you everyone!

