



United Way of Charlotte County

Our Vision: A community where all citizens achieve their potential through education, financial stability, and healthy lives.

Values: Compassion, Excellence, Integrity, Partnership, and Accountability

Mission: Mobilizing the power of our community to break the cycle of poverty

WORKPLACE DIGITAL CAMPAIGN TOOLKIT

Thank you for leading your workplace campaign on behalf of the United Way of Charlotte County. Our workplace campaigns are about bringing people together where they work to tackle our community's most challenging issues – because no one person or organization can do it alone. This guide is designed to ensure that this will be easy and successful for you and your employees. We appreciate all that you do. We are here to help every step of the way! Please contact us 941.627.3539 or email info@unitedwayccfl.org.

Why United Way?

It's not just about being a good person, it's about investing wisely. United Way of Charlotte County creates opportunities by focusing on the building blocks of a good life, and in turn strengthens the community for all of us through three bold goals **Financial Stability, Education, Health & Wellness**. The challenges facing our community are real. So, who can fix them? This is where you come in. Your support helps United Way of Charlotte County change lives forever right here where we live and work. **You are helping us with our mission to break the cycle of poverty.**

How Does United Way Work?

- 99% of your donations we collect stay right here to address the needs of Charlotte County residents – just 1% goes to assist United Way Worldwide.
- We are your community solutions provider! We assess the critical issues of our community and tackle them. According to the ALICE report, our biggest issue is those living just above the poverty level. These are people who are working but struggling from paycheck to paycheck and walking a financial tightrope.
- In February volunteers from all walks of life (and you're invited too!) come to the table to vet the non-profit agencies and their programs

THREE EASY STEPS TO RUN A WORKPLACE CAMPAIGN

1. Plan your campaign activities

- Ask your CEO to choose a manager to coordinate a leadership event.
- Endorse a campaign letter to all employees.
- Determine your timeline, kickoff and end dates, set a goal.
- Schedule virtual United Way presentations to educate your employees.
- Hold United Way meetings and events, in small groups if feasible, to get employees together.
- Have fun and learn more about community needs.

2. Wrap up the Campaign

- Set a clear end date and communicate to everyone in your organization.
- Collect all of the pledge forms, whether employees contributed or not.
- Follow up with anyone who did not attend a meeting.
- Report results to employees.
- Fill out United Way report envelope and return to United Way
- Thank all employees through messages in newsletters, bulletin boards, etc.

3. Promote United Way of Charlotte County year-round

- Educate, educate, educate!
- Volunteer! There are many volunteer activities available.
- Work closely with your United Way of Charlotte County Representative who is ready to provide you with ideas and suggestions.

Handling Objections

- ✓ Listen to the objection. Strive to see the objection from the other person's point of view, not your-own, even if you feel that point of view is misinformed.
- ✓ Remember that questions and objections are not personal.
- ✓ If you cannot find the answer to a question or adequately respond to an objection, contact your United Way representative for help.
- ✓ Encourage discussion. Every discussion is an opportunity to educate people about how United Way helps improve our community.

**The #1 reason people do not give is because they are not asked.
These helpful tips will make it easier to ask people to give.**

- ✓ Make your own personal contribution before you ask someone else to.
- ✓ Announce solicitation period before you ask for pledges
- ✓ Educate employees on how their donations will help the community
- ✓ If necessary, ask employees one-on-one for their gift
- ✓ Ask donor to give more than last year, not less.
- ✓ After a United Way presentation collect all completed pledge cards.
- ✓ Recruit help to make sure all employees have been asked to participate.
- ✓ Personally connect employees to United Way of Charlotte County and our cause.
- ✓ Make sure everyone is aware of what we do locally.

YOUR CAMPAIGN CHECK LIST

Campaign Date(s) _____

8-6 Weeks before Kickoff *CREATE a fun and memorable campaign*

- Meet with and obtain CEO commitment for your upcoming campaign.
 - Schedule campaign dates (limit to one week or one payroll period).
 - Provide details to United Way if you are requesting pledge forms or online pledging.
 - Solicit incentive items to encourage attendance (food, door prizes, etc.)
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6-4 Weeks before Kick-off *ENERGIZE – Recruit a strong team to lead your campaign.*

- Establish a Campaign Committee representative of all departments within your company.
- Set a goal.
- Contact your UWCC Rep and discuss ways she can help, request campaign materials.
- Educate the committee through videos, materials, etc.

4-3 Weeks Before Kick-off *INSPIRE – Share the United Way story with all employees.*

- Ask CEO to issue letter to employees announcing campaign dates and details.
- Notify all department supervisors of campaign dates and ask for their support in having employees attend campaign meetings and/or watching videos.
- Choose a time and place that is convenient to most people.
- Review previous year's campaign and decide what ideas to repeat and which to re-evaluate.
- Reserve rooms for video presentation/s.
- Establish a campaign timeline so everyone is on the same page.

2-1 Weeks before Kick-off *ENGAGE – Connect employees to our work.*

- Hold company Leadership Giving and supervisor meetings prior to employee campaign meeting.
- Confirm all meeting details with United Way of Charlotte County Representative.
- Promote the campaign - hang posters on bulletin boards, include campaign and incentives information in company newsletter, send emails, distribute payroll stuffers, etc.
- Post the Service Map on company bulletin boards or in newsletter.
- Purchase/order refreshments in preparation for your kickoff.

Week of Campaign *ASK everyone to give.*

- Hold an organization-wide kick-off event utilizing email, social media, bulletin boards, etc (in house avenues)
- Distribute personalized pledge cards and promote 100 percent card return.
- Post Campaign Tracking Charts and update them daily.
- Make sure to follow-up with past contributors who have not yet responded.
- Schedule company activities to promote awareness and excitement of campaign.
- Display your support and excitement of the campaign by having your committee members wear United Way campaign t-shirts.

1-2 Weeks Post Campaign *THANK everyone for giving.*

- Tally final campaign results.
- Ensure that all pledge cards have employee signatures.
- Meet with CEO and report results.
- Announce final report to employees and thank them for their support.
- Conduct final meeting with Campaign Committee and choose Chairperson for next year.
- Submit tally sheet, pledge forms, cash and checks to United Way of Charlotte County.

Payment options can be made as a one-time payment or monthly/bi-monthly/quarterly:

- Check
- Credit Card
- Online Giving
- Pledge Forms
- Employee Campaigns.

What is Included in Your Workplace Digital Campaign Toolkit

- 1) UWCC Campaign 2020/2021 DVD
 - a. UWCC Rep presentation
 - b. Collaboration videos
- 2) Printed PDF Presentation
- 3) UWCC 2018-2021 Strategic Plan
- 4) Funded Partner Agencies List