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# CAMPAIGN COORDINATORS GUIDE TO A GREAT VIRTUAL OR ONSITE CAMPAIGN

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United Way  
of North Central Florida



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## ABOUT UNITED WAY OF NORTH CENTRAL FLORIDA

UWNCFL fights for the health, education and financial stability of every person in our community and has been a staple in North Central Florida since 1957. We serve a six-county area that includes Alachua, Bradford, Dixie, Gilchrist, Levy and Union counties.

Since our inception, we have raised more than \$100 million for the region. Our top priority is to create real social change that leads to better lives and healthier communities for North Central Florida.

Our current strategic goals for the community include:

**HEALTH:** Children and adults live a healthy lifestyle, live in and maintain a safe and healthy environment, and have access to healthcare and services.

**EDUCATION:** Children are born healthy and enter school ready to be successful and graduate from high school on time.

**FINANCIAL STABILITY:** Reduce domestic impediments to education created by poverty; individuals and families build financial stability and obtain stable and affordable housing.

To meet these goals, we must partner with other agencies, organizations, educational institutions, government and individuals who share our vision for the future. This includes collaborating with more than 40 local nonprofit Community Impact Partners while serving as:

- fiscal agent for the University of Florida's Campaign for Charities (UFCC)
- administrator for FEMA's Emergency Food & Shelter Program (EFSP) funds
- lead agency for the North Central Florida Alliance for the Homeless and Hungry Continuum of Care
- coordinator for Alachua County's Campaign for Grade Level Reading
- and more!

# CAMPAIGN BASICS: 5 STRATEGIES FOR SUCCESS

United Way of North Central Florida provides all the assistance and resources that Employee Campaign Coordinators need to implement strategies that will maximize their company's campaign success. As you begin preparing for the campaign:

- Contact your United Way representative for assistance with planning and preparation.
- Visit our website at [www.unitedwayncfl.org](http://www.unitedwayncfl.org) for ideas and resources including the Workplace Campaign Toolkit.
- If your workplace is operating virtually, make a list of workplace tools available to communicate with your team, i.e. video-conferencing options, email newsletters, employee Intranet, Facebook Workplace, etc.

## 1. Affirm Top Management Support

- Host a meeting (in-person or virtually) with your CEO/leadership and United Way representative.
- Gain approval for recruiting a campaign committee, 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 increase giving.

## 2. Recruit a Campaign Committee

- Recruit a diverse team that includes people from different departments and levels (management, administration, new hires) 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 meeting in person or virtually to answer questions and offer ideas. Discuss campaign strategies that fit within your company culture.
- Determine the means of pledging best suited to your company. We have three options available, as well as a "rollover" option. Work with your United Way representative to choose which option is best for you.

- Determine the campaign timeline including the pledging time frame and any presentations or activities that will be taking place. United Way is equipped to present virtually via Zoom or Microsoft Teams.
- Outline campaign activities and determine which team members will be responsible for implementation, including organizing the campaign kickoff, distributing pledge information, conducting special events (in-person or virtually), and incentives.
- 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
  - If you are working in-office, place information (posters, flyers, goal thermometers, etc.) in high traffic areas around your office such as entryways and break rooms in the weeks leading up to the kickoff so employees have an opportunity to learn about United Way.
  - If you are working remotely, send emails with information provided by United Way to help educate employees.
- Hold a Campaign Kickoff
  - Start the campaign with your company's leadership team and campaign committee a week prior to the general kickoff. This can be done virtually if necessary.
  - Make the kickoff event fun and engaging for employees and be sure to communicate campaign goals, time frame, 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) and share virtual agency tours and interviews.
- 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.**
  - Educate team members on your pledge process and distribute links or pledge forms as appropriate.
  - Be prepared to answer questions about United Way. Many commonly asked questions are answered in this guide and you can always reach out to your United Way representative for additional questions.
  - Show employees the impact their contributions can make. Giving goes up when people know their gift is making a real difference.



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- Inform employees about opportunities such as Leadership Giving, which is an annual gift of \$1,000 or more. Leadership donors are recognized and thanked at a special Leadership Appreciation event each year.
- Monitor and Report Progress
  - Send out reminders to encourage employees to submit their pledges.
  - Keep a running total of dollars raised as pledges are collected. If running an online campaign or e-Pledge, your United Way representative can track this for you.
  - Provide regular updates to employees, i.e. send out email blasts, update thermometers, etc.
  - Make personal follow-ups with individuals who have not pledged as the campaign nears the end.
- Wrap-Up the Campaign
  - Ensure all pledges are turned in or completed online. 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.
  - 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, if you are not working remotely, hang thank you posters. Don't forget to thank your campaign committee for all their help!
  - Invite your United Way representative to come and thank your employees personally.
  - 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.
- Invite your United Way representative to visit and share updates and news with employees on a regular basis throughout the year so they can see the impact of their contributions.
- Work with your United Way representative to organize group volunteer projects for employees and provide information about opportunities they can take advantage of on their own.
- Join us for United Way Express Bus Tours where we visit some of our funded partners to give you an exclusive view of where your donation goes.
- Conduct a donation drive to collect much needed supplies such as food, toiletries, diapers, blankets, etc. Contact your United Way representative for a collection bin and flyers.



Truist



Avmed



Carr, Riggs & Ingram



Alachua Co. Library



Nationwide



Publix

## CAMPAIGN MATERIALS & RESOURCES

We understand that you're busy and running a United Way campaign is in addition to your regular job responsibilities. With that in mind, we want to give you all the tools, resources and help you need to make your campaign a success without becoming a burden.

Visit us online at [unitedwayncfl.org/campaign-toolkit](https://unitedwayncfl.org/campaign-toolkit) to access the following materials:

- Editable PDF Pledge Form
- United Way Brochure and other collaterals
- Flyers
- Videos
- LIVE UNITED Success Stories
- and more!

If you're foregoing paper pledge forms, your United Way representative can help you setup an easy online pledge option or custom e-Pledge.

## CAMPAIGN CHECKLIST

### Before the Campaign:

- Meet with your United Way representative.
- Complete and return the “United Way Campaign Payroll Contact” sheet.
- Secure CEO/Senior Management support.
- Review campaign history and set your goals.
- Recruit a campaign committee to help with the campaign.
- Determine your campaign plan, time frame and any incentives.
- Craft your campaign communications and gather any campaign materials.
- Schedule your kickoff, United Way speaker and any special events.
- Promote the campaign with an announcement.

### During the Campaign:

- Share giving links or pledge forms and campaign materials to every employee. Remember, online options are available if you’re conducting a virtual campaign.
- Promote the campaign, kickoff and special events through numerous channels.
- Hold a mid-campaign committee meeting to review the progress towards the goal.
- Send regular progress reports to employees and reminders about campaign events, incentives and deadlines.
- Follow-up with individuals who have yet to pledge keeping in mind current circumstances.

### After the Campaign:

- Schedule a time with your United Way representative to close out your campaign.
- Take care of any corporate contributions or matches on employee giving.
- Send a thank you letter to everyone including the campaign committee and the CEO.
- Invite your United Way representative to say “thank you”.
- Publish a short story, photo and results of your campaign in your company newsletter and share through social media.
- Hold a post-campaign committee meeting to evaluate the challenges and successes of the campaign. Keep the notes handy for next year!
- Talk to your United Way representative so that we can continue to improve our service.

### Year Round:

- Keep employees updated on the activities of United Way, such as United Way Express Bus Tours, donation drives and volunteer opportunities.



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- Invite your United Way representative to visit quarterly to provide updates.

## FREQUENTLY ASKED QUESTIONS

### **I'm not sure what United Way Does?**

United Way of North Central Florida (UWNCFL) is a local health and human services organization. We work to serve those living in Alachua, Bradford, Dixie, Gilchrist, Levy and Union counties. We are a part of a larger worldwide organization known as United Way Worldwide. We are one of 1,400 independent, local United Way organizations across the country. We are governed by our own local Board of Directors and led by our local President & CEO. We are not managed, controlled or directed by United Way Worldwide. We are North Central Florida's single largest funder of human services and non-governmental funder of education initiatives. Since 1957, we have raised nearly \$100 million for programs that demonstrate a lasting impact in the community and help to change people's lives for the better.

### **I get pressured to contribute. Do you endorse this?**

Absolutely not. Giving to UWNCFL is strictly voluntary. Your gift does make a difference, and we want you to make an informed and willing decision when you give.

### **Why do I need to give locally? I already support several national charities.**

While we all have our favorite charities, UWNCFL is your community solutions provider and is uniquely positioned to both identify current and emerging needs in our area and provide targeted solutions. We help a range of programs and services that help our entire community for the better.

### **My spouse or parents already give, why should I?**

United Way depends on the generous support of everyone in the community. Many couples choose to give at both workplaces because they want to participate with their coworkers. It's also a great way to support your individual company's efforts in building community. By everyone doing their part, we can continue to provide critical services to those in need. Additionally, combined gifts of \$1,000 or more are recognized as Leadership donors.

### **Do United Way donations support church-related activities?**

UWNCFL only supports health and human services programs, not religious activities. We do fund programs provided by agencies that offer a wide range of services including some that are affiliated with local churches. However, these programs are supported because they meet a critical community need and are not religious in nature or approach.



### **How is United Way different from other nonprofit organizations?**

No other single organization meets the broad range of needs addressed by United Way. We go 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. We also monitor the performance of grant-funded projects and report results, recruit volunteers for nonprofit agencies and community projects, and offer programs such as 211, ReadingPals, VITA and Singlecare.

### **Why give to United Way through my workplace?**

You make a difference. You're making a smart investment that benefits the entire community, not just one program, issue or population. This leads to a stronger, more sustainable place to live and work. UWNCFE provides expert management of donor investments and brings the right people, ideas and resources together to solve the most pressing needs of our community and finds innovative solutions for lasting change. Giving through your workplace campaign is easy and convenient. Most importantly, it allows you to spread your philanthropy throughout the year.

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

Through payroll deduction, you can invest 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 a real, measurable impact in the community. Skipping just one latte a week can add up to more than \$180, which could provide legal services and eviction prevention in order to avoid the trauma of homelessness for one household.

### **Where does my donation go?**

Your contributions fund large scale local collaborations and specific programs focused on the most significant community needs in the areas of health, education, financial stability and immediate needs. For a complete list of supported programs, please review our campaign brochure or visit our website.

### **Can I give directly to my favorite agency?**

Our Donor Choice Program allows designations to any 501(c)3 in the state of Florida. We do keep a 15% administrative fee for all designated gifts.

### **What else does United Way do besides fund health and human services programs?**

In addition to raising and investing dollars, UWNCFE brings together community stakeholders, contributors and agency partners to create collaborative and innovative approaches to help solve community issues. We coordinate a variety of initiatives and programs such as the Alachua County Campaign for Grade Level Reading. We also serve as fiscal agent for the



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University of Florida’s Campaign for Charities (UFCC), administer FEMA’s Emergency Food and Shelter Program, and serve as the lead agency for the North Central Florida Alliance for the Homeless and Hungry Continuum of Care. We operate two programs, ReadingPals and VITA. ReadingPals is a community of volunteers who serve as unforgettable mentors, dedicated to improving the reading skills of elementary-age children at schools and after-school centers across Alachua County. The Volunteer Income Tax Assistance (VITA) program provides free tax preparation to low-to-moderate-income community members.

### How do people get help from United Way?

UWNCFL provides 211, a free and confidential resource referral line available 24/7. Callers can access emergency counseling, disaster assistance, food, health care and insurance assistance, stable housing and utilities payment assistance, employment services, veterans’ services and childcare and family services. No matter the situation, the specialists at 211 listen, identify underlying problems and connect people in need with resources and services in the community that improve their lives. Simply dial 2-1-1 or (352) 332-4636 or visit [unitedwayncfl.org/211](http://unitedwayncfl.org/211).

## CAMPAIGN CONTACTS

Team United Way is here to assist your campaign efforts along every step of the way. Your United Way representative can be a great resource to offer ideas and suggestions to take your campaign to the next level. Please review the list below and feel free to contact us if you have questions, comments or concerns.

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