



Provide **[hope]** where it's needed most.

2023-2024 Campaign Playbook



Our Next Century.
A Force For The Future.

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5 Steps to running a successful campaign

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- 2**  **Inspire.** Share the United Way story.
- 3**  **Engage.** Connect teams to our work and show them how they can ensure a better future for their community.
- 4**  **Ask.** Ask everyone to give.
- 5**  **Thank.** Thank everyone for giving.

Should you need campaign assistance, please contact your United Way representative or call **305.646.7027**.

To learn more about how we're building a stronger Miami by improving the access to quality education, financial stability and health of everyone in our community, visit **unitedwaymiami.org**.

Dear Employee Campaign Manager,

I want to express my sincere gratitude for your invaluable role in championing United Way Miami at your organization. Your dedication is truly appreciated. Among all the organizations running employee campaigns throughout Miami-Dade County, we are incredibly thankful that yours is one of them. As your organization's Employee Campaign Manager (ECM), you are the Team Coach, your leadership and guidance will be instrumental in the success of this campaign.

At United Way Miami, we take immense pride in championing early education, workforce development and supporting partner agencies that carry out our mission with their work, ensuring all people have access to quality education and the opportunity to lead healthy and financially secure lives. In Miami-Dade, nearly half a million households are either in or one emergency away from falling into poverty. United Way is poised to provide solutions, acting as a lifeline for our community's most vulnerable members. One such initiative is UpSkill Miami, a transformative fund designed to upskill and reskill the local workforce, offering them training, support and employment opportunities in high-demand industries. Additionally, our United Way Center for Excellence in Early Education stands as a unique demonstration school with the mission of elevating the quality of early care and education for all children in Miami-Dade and beyond. By bringing together passionate individuals like you through employee campaigns, we can work together to support these initiatives and create a profound impact in the lives of countless residents.

To aid you in organizing a successful employee giving campaign, we have provided a Campaign Playbook. This guide offers innovative ideas for engaging your team and shares the invaluable best practices we've acquired from numerous successful campaigns, ensuring your efforts' effectiveness and positive impact.

I encourage you to review the content in the guide and reach out to your United Way Representative to strategize your organization's campaign. The United Way team is here to provide support and assistance every step of the way.

Once again, thank you for your unwavering commitment as an ECM. We eagerly anticipate an outstanding campaign season ahead!



Sincerely,



Symeria T. Hudson

President & CEO

United Way Miami

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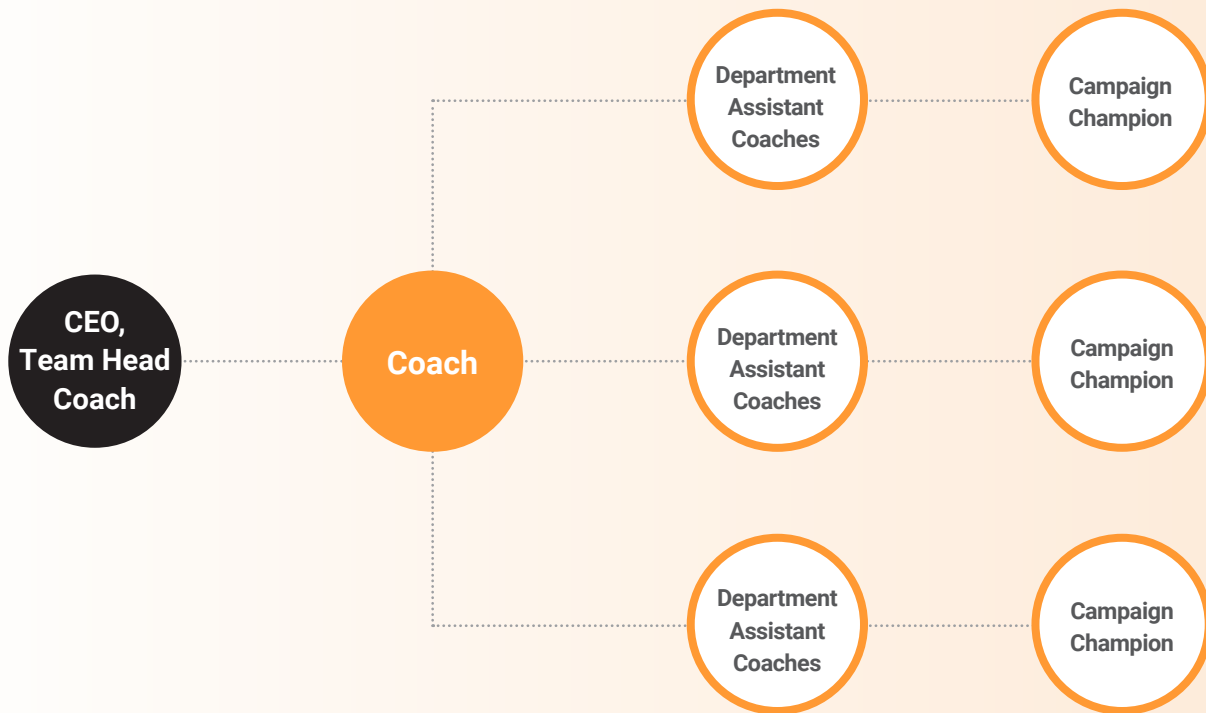


Energize

Recruit a strong campaign team.

Your role

- ▶ Generate ideas and motivate team members, even while still part of a remote workforce
- ▶ Motivate participation and generate awareness within your department or the group of employees to which you are assigned
- ▶ Address and answer your team members' questions about United Way
- ▶ Invite employees to make a contribution and support the campaign
- ▶ Collect gifts through whatever digital system or process has been implemented
- ▶ If campaign is via ePledge, get access to the reporting tools to monitor participation



Your best team will have broad representation from all departments and levels.

Find team members who are motivated, vocal, and natural leaders who can mobilize others to get involved. Other tips on creating a strong team include:

- ▶ Get an executive to join the team to help secure resources
- ▶ Urge team members to set goals for their departments and assist in deciding how best to engage peers
- ▶ Appoint assistant coaches for each of the giving communities to recruit leadership giving

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Inspire

Use this Coach's checklist to stay organized and on track for running an exceptional campaign.

Plan

- ▶ Meet with your United Way representative to create campaign timeline, engagement activities and campaign messaging. Go to [United Way's Employee Campaign Manager Form](#).
- ▶ Schedule CEO visit to present draft of plan, determine campaign goals and secure approval
- ▶ Create campaign goals (fundraising/participation)
- ▶ Identify and recruit your internal campaign team, include executives and ambassadors
- ▶ Determine campaign dates
- ▶ Select employee giving options
- ▶ Work on campaign communications
 - Does your campaign have a theme?
 - Do you have new information to share about United Way? Go to [United Way's campaign toolkit](#) to access information, statistics, results, videos and more
 - Do you have a campaign calendar of events to post on your intranet with a link to your ePledge site?
- ▶ Gather your campaign team to demonstrate and train them on ePledge, share campaign calendar, plans, etc.
- ▶ Identify opportunities to involve organized labor
- ▶ Promote United Way Giving Communities
- ▶ Host fun events such as a "Top Chef" competition, talent show, etc.
- ▶ Send regular communications utilizing the messages provided by United Way to all employees and targeted to those who have not contributed
- ▶ Regularly track and communicate campaign results by utilizing the reporting tools in ePledge
- ▶ Host a Campaign Finale to celebrate final results

Close

- ▶ Announce campaign results via intranet or e-mail to all employees
- ▶ Make sure to thank all contributors for their participation
- ▶ Plan some post-campaign activities to keep employees involved such as a food or toy drive or other engagement opportunities throughout the year
- ▶ Stay involved and informed through regular communication with your United Way representative and attend United Way events throughout the year
- ▶ Schedule CEO visit to debrief on campaign
- ▶ Sponsor and attend United Way signature events

Run

- ▶ Hold an all-staff campaign kickoff with your CEO encouraging everyone to give and to participate in all activities
- ▶ Follow the event with an e-mail message from the CEO, encourage staff to give and to participate and lastly, include a direct link to ePledge
- ▶ Conduct agency tours, interactive and volunteer activities
- ▶ Hold United Way presentations by department or at all-staff meetings — make sure to include a United Way representative and volunteers in those presentations

3



Engage

Best practices to connect team members.

CEO

CEO, Head Coach

- ▶ Approve one on one meetings with senior executives to ask for leadership gift and campaign presence
- ▶ Host a potential Tocqueville Tuesday
- ▶ Send a workplace campaign launch communication to employees
- ▶ Send a thank you communication to all employees for their support and participation at the end of the campaign

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Leadership

- ▶ Ask your executives/department heads to set aside 5-10 minutes for a United Way speaker at management and staff meetings
- ▶ Share information about giving communities
- ▶ Appoint assistant coaches for each Giving Community

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Employee, Team Member

- ▶ Promote giving
- ▶ Focus on building employee knowledge of United Way, its agencies, and its practices through individual department presentations
- ▶ Create special events to engage employee participation
- ▶ Incorporate raffles to encourage giving (ideas: PTO, gift cards, lunch with CEO)

Year-Round

Year Round Involvement

- ▶ Publicize United Way's year-round [events calendar](#) and [volunteer opportunities](#)
- ▶ Volunteer! Give an hour. Give a day. Every minute counts in our fight for a stronger Miami. For more information, visit volunteermiami.org





Engage (continued)

WEEK 1

MONDAY

Host a kickoff event with United Way staff, show campaign video and host an agency speaker. Open up pledging and discuss plans for the next event. Incentive Idea: If you make your pledge by 2 p.m. today, you will be entered into a special gift card drawing.

TUESDAY

Thank event attendees and share new information (video, materials). If kickoff was virtual and recorded, invite those unable to attend to watch recording.

WEDNESDAY

Email touchpoint (video, materials).

THURSDAY

We encourage you to take a break from messaging to prevent donor fatigue.

FRIDAY

Recap week and what activities are ahead.

WEEK 2

MONDAY

Show video, email campaign updates (possibly coming from leadership) and encourage everyone to pledge before Friday.

TUESDAY

We encourage you to take a break from messaging to prevent donor fatigue.

WEDNESDAY

Virtual or in-person event such as panel discussion with agencies or trivia game at the end with a prize.

THURSDAY

Final push to encourage pledging. Email touchpoint (video, materials).

FRIDAY

Reminder email in the morning to pledge. End pledging in the afternoon and announce total!

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Ask Ideas to make it all FUN.

Engaging and easy ideas that put a little FUN in your fundraising

Here are some new ways of engaging all your team members while continuing to build a stronger Miami.



Carnival-themed party

- ▶ Whether it is a dunk tank, ring toss or a pie in the face, employees love participating in carnival themed activities for a small donation, especially when top executives are involved



Fundraising with food

- ▶ Bake sales
- ▶ Lunchtime barbecues
- ▶ Ice cream socials
- ▶ International food festivals
- ▶ All are great ways to gather employees and enjoy a meal to benefit United Way



Walk or run

- ▶ You can use the great outdoors as an excuse to continue to build a stronger Miami. Create a warm up for everyone that signed up, and little competitions throughout—best themed outfit, most social media participation, as examples—to keep everyone energized and engaged



Halloween fun

- ▶ Try a pumpkin carving or a costume contest by department to build team spirit and celebrate the holiday



Parking spot prize

- ▶ Dedicate a few select parking spaces and sell tickets for a chance for winners to park like a VIP



Days off drawings

- ▶ Host a “days off drawing” in which employees purchase tickets for a chance to win days off from work



Cooking competitions

- ▶ Discover who the best chef is at your workplace by organizing a competition based on popular television shows such as “Iron Chef” or “Chopped”



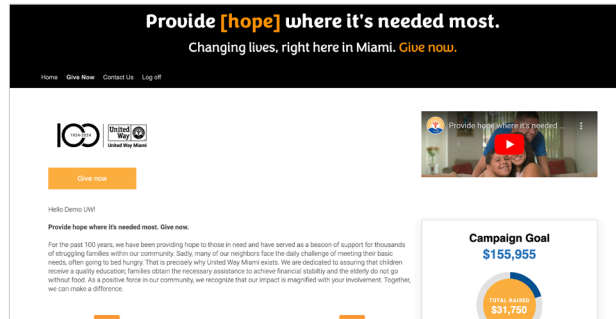
Lip sync or karaoke competitions

- ▶ Ask executives or departments to go head to head in some singing fun for a cause
- ▶ Employees can donate to ensure their executive is the “lucky” winner to perform
- ▶ Executives can buy their way out of the competition, for a cost

5



Thank Easy-to-use platforms to track and thank your team.



Virtual (ePledge)

- ▶ Ability to send personalized emails directly to employees
- ▶ Company co-branded
- ▶ United Way staff handles spreadsheet of results and payroll information

Paper pledge forms

- ▶ Requires no set up
- ▶ A great tangible reminder for donors

	ePledge	Paper
Option to give via payroll, credit card or cash	●	●
Can be personalized and/or company branded	●	●
Ready in 24 hours		●
Ability to check status/get results any time	●	
Link to brochure, video and website on site	●	
Real-time results thermometer	●	
Can be personalized	●	
A great tangible reminder for donors	●	
United Way send pre-approved emails directly to employees	●	