



WE'RE HERE TOGETHER.

2024-2025 Campaign Playbook



We're here.



United Way Miami



We're here.








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We're HERE together to support:

- **Health & Wellbeing:** Healthy lifestyles, mental health support, family counseling, Rx discounts and more.
- **Education:** Early childhood education, youth mentorship, tutoring, college prep, career exploration, professional learning, life skills and more.
- **Resilient Communities:** Disaster recovery, drowning prevention for young children, connecting thousands of callers to services and more.
- **Economic Mobility:** Skill building, veteran job training, housing assistance, tax prep, financial coaching, student loan help, homeless support and more.



Health & Wellbeing **Education** **Resilient Communities** **Economic Mobility**

For assistance with a campaign, please contact your United Way Miami representative or call **(305) 646-7037**.

Learn more about how we elevate lives: unitedwaymiami.org

MEET THIS YEAR'S UNITED WAY MIAMI CAMPAIGN CHAIRS



Campaign Chair
Felipe Basulto

Market President
Retail in South Florida
TD Bank



Campaign Co-Chair
Madeline Pumariega

President
Miami Dade College

24845-08-24

Dear Employee Campaign Manager,

Thank you for championing United Way Miami at your organization. We're HERE because of volunteer leaders like you. As your organization's Employee Campaign Manager (ECM), your leadership and guidance are instrumental to the success of this campaign.

Creating a stronger Miami-Dade takes all of us. We are all a part of this community, and there are so many people who need our help. By working together, we have the power to transform lives—it's what we've been doing for 100 years. We're so glad you are joining us!

This Campaign Playbook will help you organize a successful employee giving campaign. Inside, you'll find engagement ideas and best practices drawn from the many successful campaigns led by ECMs in the past.

Together, we will transform lives by empowering the nearly **500,000** hardworking families in our community striving to make ends meet. With your support, United Way Miami focuses on four core pillars: **H**ealth & Wellbeing, **E**ducation, **R**esilient Communities and **E**conomic Mobility. We address these needs by investing in more than **100** programs through more than **60** partner agencies and supporting **17** additional initiatives throughout Miami-Dade.

Let's continue to make a positive impact that lasts. Please review the content in this guide and reach out to your United Way Miami representative for assistance with your campaign strategy. The United Way team will support you throughout the planning and execution of your employee giving campaign.

Thank you for being HERE with us. We're excited to kick off this campaign season with you!

Sincerely,

Symeria T. Hudson
President & CEO
United Way Miami

A handwritten signature in black ink, appearing to read 'Symeria T. Hudson'.



President & CEO of UWM
Symeria T. Hudson

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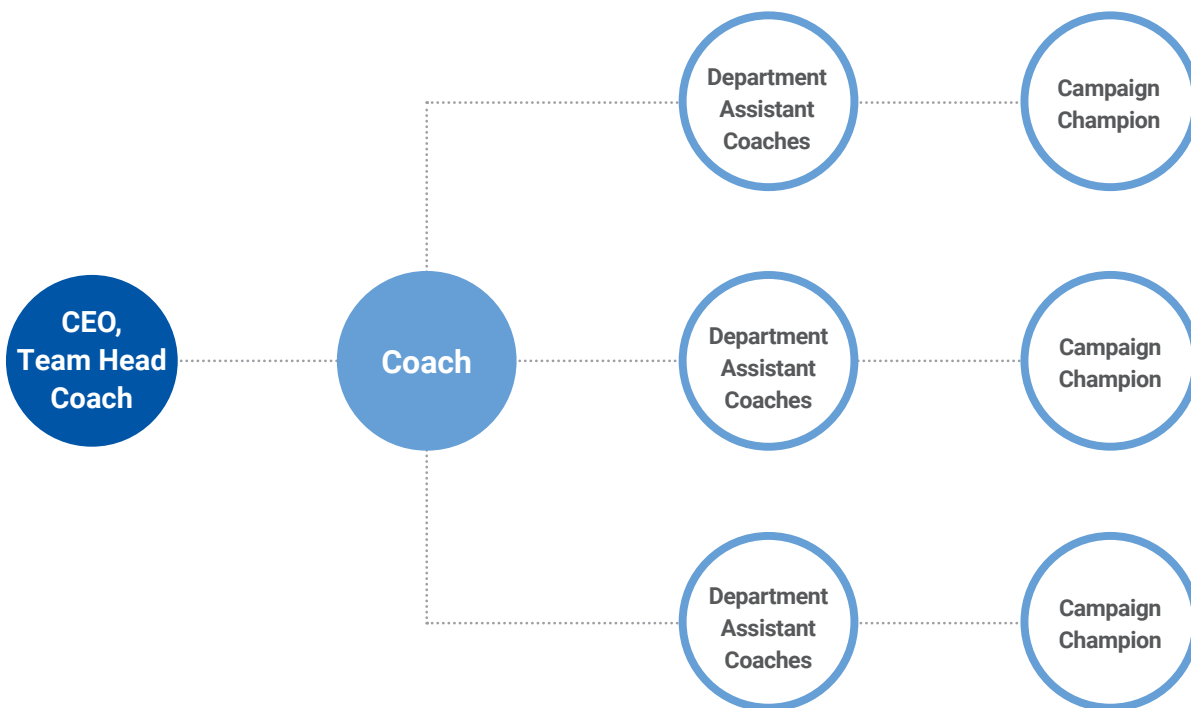


Energize

Recruit a strong team of assistant coaches to lead your campaign to victory.

Your role:

- Generate ideas and motivate team members, no matter where they are located.
- Motivate participation and generate awareness within your department or employee campaign group.
- Address and answer questions about United Way Miami.
- Invite employees to make a donation and support the campaign.
- Collect donations through whatever digital system or process your company is using.
- If your organization is using ePledge, get access to the reporting tools to monitor participation.



Recruit a winning team

The most successful teams 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 to create a strong team:

- Recruit an executive to join the team to help secure resources.
- Urge team members to set goals for their departments and help them brainstorm how best to engage their peers.
- Appoint assistant coaches for each of the giving communities to recruit leadership-level giving.

2



Inspire

Use this coach's checklist to stay organized and on track.

Plan your campaign:

- ▶ Fill out United Way Miami's [Employee Campaign Manager Form](#).
- ▶ Meet with your United Way representative for help creating:
 - Campaign timeline
 - Engagement activities
 - Campaign messaging
 - Campaign goals (fundraising/participation)
- ▶ Schedule CEO visit to:
 - Present your draft campaign plan
 - Determine campaign goals
 - Secure approval for your plan and goals
- ▶ Finalize campaign goals
- ▶ Identify and recruit your internal campaign team, including:
 - Executives
 - Ambassadors who can promote United Way Miami and the campaign's goals
- ▶ Finalize campaign timeline dates
- ▶ Select employee giving options
- ▶ Work on campaign communications:
 - Does your campaign have a theme?
 - Access information, statistics, results, videos and more at United Way Miami's [Campaign Toolkit](#).
 - 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 the campaign calendar, discuss plans, etc.
- ▶ Identify opportunities to involve organized labor, if this is part of your organization.
- ▶ Engage your team with your United Way Miami campaign through:
 - Tours of United Way Miami Partner agencies
 - Interactive and volunteer activities
 - Presentations for each department or at all-staff meetings; make sure to include a United Way Miami representative and volunteers in those presentations
 - Promoting United Way Miami Giving Communities
 - Fun events such as a "Top Chef" competition, talent show, etc.
- ▶ Send regular communications utilizing the messages provided by United Way Miami; target all employees and those who have not contributed.
- ▶ Regularly track and communicate campaign results through 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 donors for their participation – for being HERE.
- ▶ Plan some post-campaign activities throughout the year to keep employees involved, for example a food or toy drive.
- ▶ Stay involved and informed through regular communication with your United Way Miami representative.
- ▶ United Way Miami events throughout the year.
- ▶ Schedule CEO visit to debrief on campaign.
- ▶ Sponsor and attend United Way Miami 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, encouraging staff to give and to participate. Include a direct link to ePledge.

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Engage

We're HERE together – use these best practices to connect team members to our work.

Ask your CEO and/or head coach to:

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

Engage other employees by:

- Asking them to promote giving.
- Building their knowledge of United Way Miami, its agencies, and its practices through individual department presentations.
- Creating special events for them.
- Incorporate raffling to encourage giving, with prizes such as PTO, gift cards, lunch with the CEO, etc.

Engage top executives & department heads by:

- Asking them to set aside 5-10 minutes for a United Way Miami speaker at management and staff meetings.
- Sharing information about giving communities with them.
- Recruiting them as assistant coaches for each Giving Community.

Keep your company involved year round:

- Publicize United Way Miami's year-round [events calendar](#) and [volunteer opportunities](#).
- Volunteer together! Give an hour. Give a day. Every minute counts – be HERE with us as we build a stronger Miami together.
- For more information, visit volunteermiami.org.

24845-08-24



United Way Center for Excellence in Early Education



Holiday Drive

3



Engage

We're HERE together – use these best practices to connect team members to our work.



WEEK 1

MONDAY

Host a kickoff event with United Way Miami 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

Use these ideas to make it fun to ask everyone to give.

Were *HERE* together – put a little *FUN* in your fundraising



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



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



Parking spot prize

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



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”



Sports Competition

Gather your colleagues and leadership for a Pickleball tournament. Participation can require a donation or entry ticket sale and at the same time encourages team building



Photo Contest

Encourage participants to pay to enter their photos. You can display and name a winner of the best photo while charging for each vote



Fundraising with food

- Bake sales
- Ice cream socials
- International food festivals
- Lunchtime barbecues

All are great ways to gather employees and enjoy a meal to benefit United Way Miami



Holiday celebrations

Many customs and traditions make the season special.

- Halloween pumpkin carving or costume contest
- Halloween pumpkin patch: find a local vendor/farm that will donate the pumpkins and sell on site
- Thanksgiving potluck contest
- End of year winter celebrations from around the world



Days off drawings

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



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



Paint Your Own

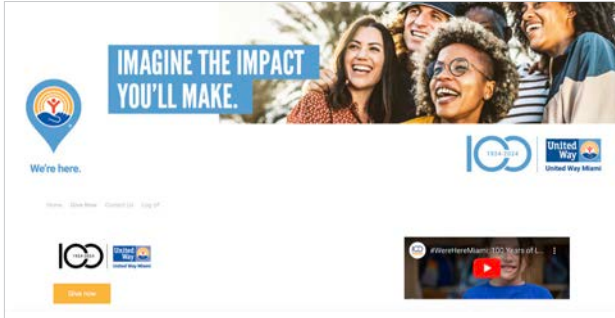
Bring together your colleagues and have them show off their painting skills. Each participant can pay for the ticket to participate. The final ‘best’ art piece can be sold for a designated value. Any sale can be a donation

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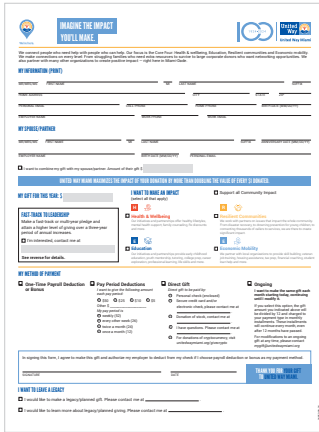
Thank

Tap into easy-to-use platforms to track giving and thank everyone on your team.



Virtual (ePledge)

- Ability to send personalized emails directly to employees
- Company co-branded
- United Way Miami 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 Miami sends pre-approved emails directly to employees	✓	

GOOD STARTS RIGHT HERE.

Thank you for helping us help our community.