UNITED WAY PLAYBOOK

LIVE UNITED®
DEAR CHANGEMAKER,

Thank you for being an agent of change in our community through United Way and our partners. You are making such a difference in the lives of thousands across our community.

If you are a longtime supporter of United Way, thank you for your ongoing commitment. If you are new to United Way, thank you for joining the fight for a better, stronger Northeast Florida. We are honored to have you on our team.

In this United Way Playbook, you’ll learn about the best practices of coordinating a United Way fundraising campaign and ways you can roll up your sleeves and make a difference through volunteerism, too. We hope you find the information helpful.

As a philanthropic leader in our community, your energy and commitment will have a direct impact on the strength and quality of life in Northeast Florida.

Keep in mind United Way fundraising and volunteer engagement staff members stand ready to support you in every possible way. Don’t hesitate to contact us for whatever you need and to answer any questions that arise.

Thank you again for being a leader in helping United Way mobilize the caring power of our community to improve lives in Northeast Florida. It’s because of you we are making great strides in creating a community of opportunity where everyone has hope and can reach their full potential.

With great thanks,

Michelle Braun
President and CEO, United Way of Northeast Florida
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History

United Way of Northeast Florida is a 501(c)3 nonprofit organization committed to positive community change. Founded in 1924, United Way has earned a reputation as a respected and efficient philanthropic organization.

Our more than 90 years of addressing human-service needs in Duval, Baker, Clay, Nassau and Northern St. Johns counties is made possible through the commitment of thousands of volunteers, contributors and community partners.

Vision and Mission

We fight for the health, education and financial stability of every person in Northeast Florida. Our vision for Northeast Florida is a community of opportunity where everyone has hope and can reach their full potential. Our mission is to connect people, resources and ideas in order to:

• Ensure basic needs are met for all throughout the region.
• Produce meaningful and measurable results in the areas of youth success, financial stability and health.
• Invest in historically challenged neighborhoods connecting efforts to impact generational poverty.
Basic Needs
Basic needs are essential for survival: food, shelter, clothing, emergency assistance and access to health care, to name a few. United Way supports agencies that deliver a variety of these safety-net programs.

Youth Success
Too many of our children and youth face challenges that set them back for life: poor preparation for school, stressful home environments and overwhelmed parents, to name a few. United Way strategies give these children a second chance through a continuum of services to address these challenges.

Financial Stability
Increasing income, building savings, and gaining and sustaining assets are the basics to building a better future. United Way and its partners offer a range of services to help families move toward financial security and, ultimately, upward economic mobility.

Health
Health is a basic need that affects every aspect of a person’s daily life. Good mental and physical health allows children to learn better and adults be independent and productive citizens.
Every workplace campaign is different and can be shaped around your organization’s culture. Here are the four basic steps and keys to running a successful campaign.

1. Prepare
   Plan your campaign in advance, and recruit a strong team to help lead your company’s effort.

2. Inspire
   Share the United Way story with all employees, and connect them with our work to show how their support can ensure a better future for the community.

3. Ask
   Encourage and ask everyone to make a gift.

4. Thank
   Make sure everyone feels appreciated for their generosity.
Much of your company’s campaign success will be determined by your preparation. The information in this section will walk you through steps to ensure you are ready to run a successful campaign.

**Develop Your Plan**

1. Schedule a meeting with your United Way development manager.
   - Review your organization’s campaign history, and schedule ongoing meeting dates to plan the campaign.

2. Develop a timeline. Include:
   - Best time to run the campaign (start and end dates).
   - Length of campaign.
   - Involvement of all company locations (where appropriate).
   - Campaign team/volunteer training.

3. Set goals for the campaign. Consider setting your goal by:
   - Increasing the number of people who give through payroll deduction.
   - Asking employees to consider increasing their gift from the last year.
   - Adding donors who qualify for membership for giving societies: Tocqueville, Builders, Leadership and affinity groups.
   - Asking for a corporate gift or match.

4. Run the campaign.
   - Implement your campaign plan.
   - Publicize the campaign.
   - Ask employees for donations using paper forms or online pledging.
   - Schedule volunteer projects or Day of Impact activities.

5. Wrap up the campaign.
   - Say thank you.
   - Report results.
   - Collect feedback and ideas for use the next year.
Develop Your Campaign Timeline

Below is a sample timeline that can be used for a workplace campaign. Your United Way development manager can help you develop a timeline that’s right for your company.

12 Weeks Before Kickoff
- Have first campaign planning meeting with your United Way development manager.
- Select an Employee Campaign Coordinator (ECC).
- Attend ECC training.
- Meet with past campaign team to discuss previous campaign successes and challenges.
- Conduct executive briefings with senior leadership to choose campaign positions and responsibilities.
- Finalize steering team and campaign volunteer structure.

10 Weeks Before Kickoff
- Recruit additional campaign committee members.
- Begin campaign team meetings (meet once per week until campaign). Campaign team meeting should include your United Way development manager to help develop specific objectives and strategies surrounding business units and special projects (campaign communications, volunteer activities, kickoff and celebration, Giving Society campaigns and so on).
- Plan a calendar of educational activities and events.
- Begin discussions about using United Way’s eWay electronic giving site or paper pledge form.

Eight Weeks Before Kickoff
- Take campaign committee on a tour of a United-Way-funded community service provider.
- Submit requests to United Way for volunteer projects.
- Submit requests for educational speakers.
- Finalize discussions about using eWay or a paper pledge form.

Six Weeks Before Kickoff
- Set overall campaign goal.
- Develop Giving Society strategy, identify prospects and set events.
- Finalize theme and communication plan.
- Develop volunteer training schedule, meeting agendas and materials.
Four Weeks Before Kickoff
- Execute campaign posters, web messages and other communications vehicles.
- Tell United Way stories through articles on your intranet website.
- Recruit volunteers for volunteer projects.

Two Weeks Before Kickoff
- Have Tocqueville Society campaign event and begin Tocqueville Society campaign.
- Have Leadership Giving chair follow up with prospects.

One Week Before Kickoff
- Have Tocqueville, Builders, Leadership and affinity group campaign events and begin campaigns for those giving societies.
- Have Leadership Giving chair follow up with prospects.
- Begin volunteer opportunities.

During Your Campaign
- Have general employee kickoff event.
- Deploy campaign leaders to talk about United Way with staff and ask them to consider participating.
- Send initial pledge email and reminders, if appropriate.
- Share daily campaign tracking report with campaign team.
- Host business unit events to raise awareness and increase participation in pledging.
- Continue employee education meetings with United Way.
- Continue volunteer opportunities.

After the Campaign
- Announce results to all staff.
- Hold general campaign celebration.
- Send appreciation letters to volunteers.
- Thank donors who supported campaign.
- Send your campaign results and donor information to United Way.
- Hold meeting to discuss campaign outcome and evaluate for next year.
Recruit Your Campaign Team

A thoughtfully assembled team of campaign volunteers will increase the success of your campaign. The size of your team will depend upon the size of your organization. The following list of campaign volunteer titles and responsibilities gives you a starting place.

**United Way Development Manager**
- United Way staff person assigned to assist you with your campaign.
- Helps with rally planning, speaker requests, campaign materials and any questions you have.

**Employee Campaign Coordinator (ECC)**
- Develops campaign timeline with United Way development manager.
- Serves as liaison between campaign committee and United Way development manager.
- Coordinates execution of overall campaign plan.
- Arranges campaign meetings and trainings.
- Monitors and reports results.

**Leadership Giving Chair**
- Coordinates both Builders Society and Leadership giving campaigns.
- Assists ECC with communication to current and prospective Builders Society and Leadership donors.
- Consider recruiting other team members to assist with a focus on increasing Builders Society members.
- Develop a list of prospects based on salary level, position and past giving history.
- Host a Builders Society event, ideally separate from the Leadership event, such as a breakfast, luncheon or happy hour where Builders Society information can be presented.
- Consider recruiting other team members if it is an especially large effort.
- Host a Leadership event, ideally separate from the Builders Society event, such as a breakfast, luncheon or happy hour where Leadership Society information can be presented. Follow up with each prospect.
- Provides executive sponsorship of Tocqueville Society campaign.
- Assists ECC with communication to current and prospective Tocqueville Society members.
- Develop a list of prospects based on salary level, position and past giving history.
- Host a separate Tocqueville event such as breakfast, luncheon or executive briefing. Follow up with each prospect.
- Alternatively, consider using peer-to-peer solicitation for a personalized ask for support.
- Highlight Tocqueville Society and the Weaver Challenge giving option, in which donors can grow into the $10,000 commitment over three years and receive membership benefits immediately.
- Women of Tocqueville Society.
Giving Societies

Giving societies are a great way to increase employee engagement with United Way while also increasing giving.

**Tocqueville Society**
A Tocqueville gift is a donation of $10,000 or more and qualifies the donor for membership to United Way most generous giving society. These donations help set the standard for charitable giving in Northeast Florida and members are a part of a distinguished group of civic and business leaders in our community.

**Builders Society**
A Builders Society gift is $2,500 or more. Builders Society is for donors who want to have a greater impact on our community. They also enjoy exclusive networking and social events, and lead community volunteer projects for Born Learning Trail installations at local parks.

**Leadership Society**
A Leadership gift is a donation of $1,000 or more. Leadership members understand the importance of long-term investments in our community. Donations at this level are a critical part of a successful employee campaign.

**Women United**® (formerly Women in Local Leadership or WILL)
Women United® is a vibrant, diverse community of women leaders who fight for the education, health and financial stability of every person in every community. Our local group of nearly 450 women across five counties expands to a powerful, global network within United Way of 70,000+ women leaders. Members donate $1,000 or more annually and contribute their personal passions, best ideas and unique strengths to the mission of building stronger communities.

**Atlantic Circle**
Atlantic Circle engages and cultivates Jacksonville’s young professionals ages 20 to 40 and provides leadership opportunities in our community through social and professional activities, with a philanthropic focus on education. Members contribute $500 or more annually to United Way’s mission and are interested in professional and philanthropic growth.
2. INSPIRE

You can inspire your company's employees to give generously by educating them about United Way of Northeast Florida and helping them be engaged in the organization's work.

Promote and Publicize

Education, storytelling and information are the keys to reaching your fundraising goal. Your United Way development manager will help you create an atmosphere of enthusiasm as you inform employees about how their contributions help change lives in Northeast Florida community.

CAMPAIGN PROMOTION TIMELINE

Before campaign:
- Raise awareness of upcoming campaign (see ideas list on page 16)
- Thank donors for their previous support.
- Share a schedule of campaign activities.

During campaign, provide:
- Information about how to pledge. Schedule group volunteer projects through United Way (see page 24)
- Success stories and personal stories.
- Messages asking for donations.
- Employee education.
- Campaign video.
- United Way Speakers Bureau speakers
- Fun, interactive events.
- Information about incentives or matching corporate gifts.
CAMPAIGN PROMOTION TIMELINE (CONTINUED)

After campaign:

- Highlight campaign results.
- Thank donors for contribution.
- Host a fun celebratory event for all participants.

All year long:

- Follow United Way of Northeast Florida on social media. You can find us on Instagram, Twitter, Facebook and LinkedIn with the handle @unitedwaynefl.
- You are always welcome to reshare our content, and let us know if we can help craft your United Way story. Reach out to mail@uwnefl.org any time for tips and suggestions.
- We can also provide your company or organization a “Social Media Best Practices Guide.”

PROMOTION IDEAS

- Company-wide campaign rallies and events
- Internal, energetic email from your CEO or other leadership
- Ongoing email messages from your campaign chair
- Intranet site
- Volunteer projects (see page 23 for ways to volunteer)
- Posters
- Fliers
- United Way brochures and success stories
- Personalized company video or United Way campaign video
- Employee testimonials (print or video)
- Company newsletter (printed or electronic)
- Sharing your company’s support on social media and tagging United Way of Northeast Florida using @unitedwaynefl (company and personal accounts)
3. Ask

Asking for a gift is by far the most important step of an employee campaign. The No. 1 reason people do not give is because they were never asked. It is important to allow every employee to make an educated, personal decision about giving United Way of Northeast Florida.

Giving

At United Way of Northeast Florida, you can give “dollars to mission” — the most effective way to support improving lives and strengthening Northeast Florida. Contributions are maximized by investing in research-based, proven solutions that will help United Way and its partners:

- Develop integrated solutions that improve lives and communities.
- Focus on what’s most needed and what works locally.
- Bring leaders and organizations from all sectors together.
- Invite thousands of people to be part of the change and amplify the impact.
- Solve problems no one organization can solve alone.

How To Ask

Include Everyone

- Start at the top – ask company leadership to set the example by making their contributions early.
- Include off-site and remote employees.

Inform Employees

- Hold a campaign kickoff or rally to start your campaign.
- Invite your development manager to discuss the community’s needs and ask for support at a specially created or pre-existing staff meeting.
- Create options for an online meeting to reach remote employees or those who can’t leave their desks during work hours.
- Keep the meeting brief, lively and informative.
- Thank employees for their participation.
- Make individual peer-to-peer asks for support. This is especially effective when asking for a Tocqueville, Builders Society or Leadership donation or engaging new employees.
- Highlight corporate support, especially if your company has a program in place that matches employee donations.
The two most important words to remember and the ones people appreciate the most are “thank you.” Thanking everyone involved, from those who donated to those who helped implement the campaign and volunteered their time at community service projects, cannot be overemphasized and goes a long way to ensure their long-term support. There are two great ways to thank donors:

1. Thank donors through United Way.
   - Share the details of who gave to the campaign so United Way can thank individual donors. Letting United Way thank donors directly will also help your campaign going forward to retain donors.
   - Donors who gave at the Tocqueville, Builders Society, Leadership and affinity groups giving levels are eligible for membership in United Way giving societies. It is important to provide contact information for these donors to your development manager so they can receive information about the exciting events, networking activities and rewarding volunteer opportunities for which they now qualify.

2. Thank donors through the workplace campaign.
   - Post thank you posters around your workplace.
   - Send thank you letters or e-cards from your CEO, ECC and Leadership Giving chair.
   - Highlight givers of a certain level in a public space.
   - Host an event for donors who give at a certain level.
   - Give a special gift or host a special reception for campaign team leaders and your campaign committee.
   - Publicize results via your company newsletter, email or intranet.
Report Results

Timely reporting of the results of the campaign is an important part to wrapping up your United Way campaign.

• Throughout the campaign, collect all cash, checks, pledge cards and other gift information.
• Keep special event donations separate from individual contributions.
• Where possible, proof paper pledge forms submitted by donors to make sure they are filled out correctly.
• If you don’t use United Way’s paper pledge forms or the eWay online giving tool, provide your United Way development with donor details, such as names, emails, addresses and donation amounts for tax purposes and recognition, including membership information for United Way giving societies they qualify for.
• Schedule a time with your United Way development manager to visit and pick up campaign results.

Plan For Next Year

Getting an early start to next year’s campaign allows you the opportunity to execute an even more successful campaign in the future.

• Gather feedback about the campaign from senior leadership, the campaign committee and United Way staff.
• Leave notes and resources for campaign leads to use next year.
• Identify next year’s ECC and have them plan to attend future United Way ECC training sessions.
• Implement a new-hires program to give new employees the opportunity to contribute when they join the company and learn more about how United Way supports Northeast Florida.
• Work with United Way to develop and hold year-round individual or group volunteer events.
• Implement a year-round communications plan that shares the impact of United Way’s work in the community with your employees.
How long should our campaign run?
The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources for both the ECC and employees. One to two weeks is the perfect amount of time to kick off your campaign, get the message out effectively and make your ask without overburdening staff. An exception to this could be if you are the ECC at an exceptionally large company with many different work sites.

When should our campaign take place?
Most campaigns take place between mid-July and mid-November, but they can happen any time best suited for your company.

How can employees give?
Using a United Way of Northeast Florida pledge form, employees can give via payroll deduction, cash, check, credit card or through stock. Another option is through eWay, United Way’s online giving tool. You can also give to United Way by phone. Speak with your United Way development manager for more information on all giving options.

When does payroll deduction start?
Payroll deduction usually runs Jan. 1 through Dec. 31. United Way does not set your payroll schedule; it is a company decision.

I am limited on time to devote to a campaign. How can I work it into my busy schedule?
The best way to ease the strain is to recruit a committee, assign tasks and start planning early as a team. Also, be sure to reach out to your United Way development manager anytime extra help is needed.

Are donations to United Way tax deductible?
Yes. For additional information, contact United Way of Northeast Florida’s finance department at askfinance@uwnefl.org.

For any additional questions, we welcome you to reach out to your United Way development manager.
RESOURCES

Development Manager
Contact your United Way development manager to ask questions or get any information needed to help you run a successful campaign. They are here to help you energize, engage and inspire employees throughout your campaign. They are your greatest resource and are an important part of your campaign team.

Website
Visit unitedwaynefl.org to learn about our work and partners. You can also download campaign materials, success stories, posters, videos, photos, logos, sample emails and other helpful campaign tools.

Social Media
Be sure to follow @unitedwaynefl on social media – and encourage your employees to as well. You’ll find us on Facebook, Twitter, Instagram, LinkedIn and YouTube. Feel free to always use #LiveUnited in your posts, and please tag @unitedwaynefl so we can share your stories.

For additional information, email mail@uwnfl.org
Change doesn’t happen alone – and it doesn’t happen just through fundraising. Every year, United Way’s volunteer and community engagement department offers groups and individuals hundreds of community service events in partnership with our local agencies.

**Benefits of volunteerism**
- Enhance teamwork skills
- Provide hands-on training opportunities through skill-based projects
- Increase leadership skills
- Increase productivity
- Provide a service and product to the community
- A priceless sense of pride and accomplishment for your community

There are two ways you can volunteer through United Way of Northeast Florida:

**Group Volunteering**
United Way will help connect your employee teams, social groups, service organizations, families or friends to meaningful volunteer experiences that impact lives within our focus areas. Whether it’s one-day activities or quarterly projects, our United Way staff is available to assist you through the entire process.

**Individuals**
In addition to group opportunities, there are several individual community-service options available. Options include reading to 4-year-olds, mentoring middle-school students, helping file taxes, assisting with financial-education workshops and much more.

*For more information, contact United Way’s volunteer and community engagement team at volunteer@uwnefl.org.*
Group Volunteer Opportunities

There are several ways to volunteer through United Way and our partners. For more detailed information on projects, visit unitedwaynefl.org/volunteer/toolkit.

Focus-Area Projects
We’ve worked with our partners in youth success, financial stability, health and basic needs to preschedule a variety of projects to meet a range of group sizes and interests. It’s easier than ever for your team to get involved. Visit our volunteer calendar at unitedwaynefl.org/volunteer/toolkit.

Custom Projects
If a prescheduled volunteer project doesn’t meet your team’s needs, United Way can customize one of our projects based around your availability and group size. If your team would like to create a new project to make a difference at an agency partner’s location, we also offer à la carte projects. All customized projects will require a fee to cover the cost of materials as determined by project type and group size.

On-Site Service Projects
Host a volunteer event at your office, community facility or home. A list of custom projects that we can host at your location and budgets can be found in our custom project list at unitedwaynefl.org/volunteer/toolkit/custom.

Meet ALICE (Asset Limited Income Constrained and Employed)
Our custom project list has other unique experiences. United Way will facilitate a “Meet ALICE” poverty simulation exercise for your employees. A popular choice, the two to three hour exercise is a great way to learn more about hard working families who struggle every day. The simulation offers participants a realistic approach to walking in an Alice family’s shoes by simulating one month of poverty. Following the exercise, participants will share feedback about their experience during a debriefing session. The poverty simulation is designed for 42-80 participants and requires an open space of at least 2,500 square feet with enough room to accommodate up to 150 chairs and 12 tables. Please allow six to eight weeks of planning time.

Signature Events
Whether with a group or on your own, United Way and partners collaborate on a number of annual large-scale signature events. Learn how you can be part of these exciting yearly efforts by calling our volunteer and community engagement team at volunteer@uwnefl.org.
POLICY AND PROCEDURES

United Way and its partners work diligently to ensure your experience is meaningful and well-organized.

To help us provide you with the best customer service, we ask you please follow the policies and procedures listed below.

1. Please submit any custom project requests online a minimum of two to four weeks before your desired project date. Please allow four to six weeks of planning for multiple projects or a series of dates.

2. Assign a company team leader to communicate to employees about the event, including volunteer assignments, details about the project, clothing recommendations, directions and parking. United Way will provide all information to the company team leader for communication.

3. Cancellations must be made within five business days to prevent undue hardship to our partners who rely on volunteer assistance. A cancellation fee of $250 will be billed for any event not canceled within this time frame.
Individual Volunteer Opportunities

For employees looking for meaningful, ongoing ways to volunteer on their own, United Way has a number of options. Simply complete our online request form at unitedway.org/volunteer.

Whether you want to read to children, mentor at-risk youth, help families manage their finances or volunteer at our community’s 24-hour referral helpline, United Way can connect you to a wide range of local opportunities.

Read to 4-Year-Olds
Passionate, committed, caring volunteers are needed to help four-year-olds in our community get ready for kindergarten. ReadingPals visit pairs of children in preschool classrooms one hour a week to share classic children’s books, engage in conversation and play games focused on concepts like letters, colors and shapes. Volunteers meet with the same children each week. Not only do ReadingPals help build essential skills, they provide the individual attention many children need to thrive. Learn more at unitedwaynefl.org/readingpals.

Mentor an At-Risk Student
United Way’s Achievers For Life (AFL) is a research-based dropout prevention strategy that provides support, including mentors, to sixth grade students at risk of failing academically. AFL mentors meet with their students one hour each week during the school year to tutor, set goals and engage the child in conversation. Learn more at unitedwaynefl.org/achievers-for-life.

RealSense Tax Preparer
RealSense tax preparers will be trained on limited tax law and certified to prepare taxes via a computer-based program. There are three different tax preparer opportunities:

- VITA (Volunteer Income Tax Assistance) serves families whose household income does not exceed $50,000.
- AARP Tax-Aide: Tax-Aide sites serve all low-to-middle income families but can serve those with incomes above $50,000.
- Benefit Bank Counselor: prepare simple tax returns and assist clients with applying online for certain public benefits.

RealSense Client Greeter at Tax Sites
This person greets taxpayers as they enter a free tax-preparation site. Their tasks: greet taxpayers and sign them in, review taxpayers’ paperwork to make certain they have all necessary documents and keep the waiting room running smoothly. This position is also responsible for administering assessment tools to help determine what additional financial services taxpayers might find helpful and how to access them.
**RealSense Financial Educator**
Financial educators teach free financial workshops for Northeast Florida residents interested in learning how to better manage their wealth and assets. Workshops are based on a variety of non-commercial curricula, including FDIC Money Smart.

**Connect Callers to Assistance**
2-1-1 is our community’s 24-hour information and referral helpline and also serves as our community’s suicide intervention hotline. Volunteers are needed to follow up with callers for quality of assurance and effectiveness of referrals. Training is provided. Learn more about 2-1-1.

**Community Impact Fund Investment Volunteer**
United Way donors are needed to help allocate funds to programs successfully addressing youth success, financial stability, health and basic needs in Northeast Florida. The time commitment is 40 to 50 hours concentrated during the months of September through November and March through May.

*All individual inquires for volunteerism through United Way should be directed to the volunteer and community engagement team at volunteer@uwnefl.org.*
THANK YOU
for making a difference through United Way of Northeast Florida.

BECAUSE CHANGE DOESN’T HAPPEN ALONE.