DIGITAL ENGAGEMENT PLAYBOOK

LIVE UNITED®

United Way
of Northeast Florida

DEAR CHANGEMAKER,

Despite these unprecedented times, thank you for being an agent of change in our community through United Way of Northeast Florida. You are making such a difference in the lives of thousands across our community, and in the wake of COVID-19 and renewed racial tensions that have caused great pain, we need you now more than ever before.

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 more vibrant, successful Northeast Florida. We are honored to have you on our team.

In this Digital Engagement Playbook, Digital Engagement Edition, you'll learn about the best practices of coordinating a digital United Way fundraising campaign and ways you can roll up your sleeves and make a difference through virtual, at-home or safe in-person 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. Every dollar or hour you give changes someone's life.

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, especially during these tougher times. United Way has responded to Northeast Florida's most pressing problems for 95 years — all thanks to caring, compassionate, committed people like you. Together, we will overcome this pandemic by reimagining and rebuilding a stronger Northeast Florida for us all.

I look forward to seeing you virtually soon. Stay well and safe.

With great thanks,

Michelle Braun
President and CEO, United Way of Northeast Florida

TABLE OF CONTENTS

Today's United Way 5
Focus Areas 6
Staff Directory 8
Steps to a Great Digital Campaign 10
    1. Prepare 11
        Develop Your Digital Campaign Timeline. 12
        Recruit Your Digital Campaign Team 14
        Giving Societies 16
    2. Inspire 17
        Campaign Promotion Timeline. 17
    3. Ask 19
    4. Thank 20
        Report Results 21
        Debrief and Start Your Plan For Next Year 21
FAQs 22
Key Resources 23
Digital Campaign Tools and Tips 24
    Virtual Meeting Best Practices 25
    Running a Virtual Campaign Kickoff 28
    Virtual Fundraising and Incentive Ideas 30
Volunteer Opportunities 32
    Group Volunteer Opportunities 34
    Individual Volunteer Opportunities 36

TODAY'S UNITED WAY OF NORTHEAST FLORIDA

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.

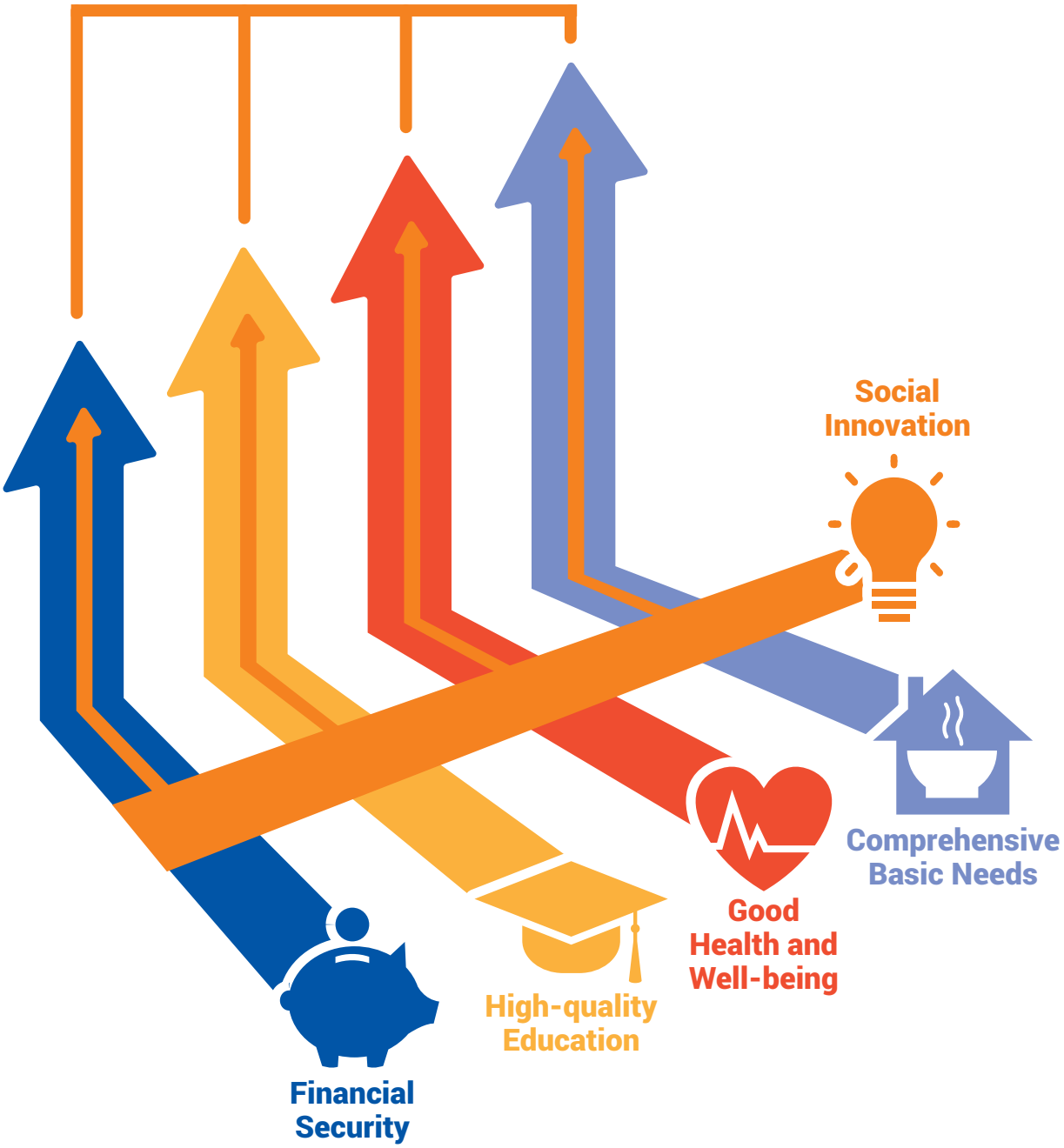
Our more than 95 years of addressing human-service needs in Duval, Baker, Clay, Nassau and Northern St. Johns counties is made possible through the commitment of thousands of volunteers, contributors and community partners.

Vision and Mission

United Way envisions a community of opportunity where everyone has hope and can reach their full potential. Because change doesn't happen alone, United Way's mission is to solve Northeast Florida's toughest challenges by connecting people, resources and ideas. The nonprofit organization focuses on five causes:

- Comprehensive basic needs
- High-quality education
- Good health and well-being
- Financial security
- Social innovation

Individual and **Family Success** = **A Vibrant Community**



STRATEGIC PRIORITIES

Comprehensive 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.

High-Quality Education

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. United Way strategies give these children a second chance through a continuum of services to address these challenges.

Financial Security

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.

Good Health and Well-Being

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.

UNITED WAY'S ENGAGEMENT TEAM

Maureen Mercho	Chief Development Officer	904-390-3234	maureenm@uwnefl.org
Bonnie Carter	Administrative Assistant for Maureen Mercho	904-390-3256	bonniec@uwnefl.org
Linda Olson	Director of Resource Development Operations and Data Management	904-390-3246	lindao@uwnefl.org
Pamela Ducas	Director of Corporate Engagement	850-324-8304	pamelad@uwnefl.org
Jackie Hadley	Director, Tocqueville Society	904-330-3952	jackiea@uwnefl.org
Michael Elias	Head of Major Gifts, Planned Giving and Affinity Groups	904-330-3951	michaele@uwnefl.org
Alecia Givens	Development Manager, Corporate Engagement	904-390-3288	aleciag@uwnefl.org
Mark Mitchell	Development Manager, Corporate Engagement	904-390-3293	markm@uwnefl.org
Gabrielle Dean-Rector	Development Manager, Corporate Engagement	904-390-3254	gabrielled@uwnefl.org
Kenya Bell	Manager, Leadership Giving	904-390-3295	kenyab@uwnefl.org
Tondra Hill	Development Manager, Corporate Engagement and Affinity Group Leader	904-390-4016	tondrah@uwnefl.org
Erica La Spada	Manager, Volunteer and Community Engagement	904-390-4006	erical@uwnefl.org

Don't know who to contact to get started?

Email mail@uwnefl.org, and you'll be connected to the appropriate United Way staff member.

STEPS TO A GREAT DIGITAL CAMPAIGN

Every workplace campaign – whether all digital, all in-person or a hybrid – is different and can be shaped around your organization's culture.

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 Northeast Florida.

3. Ask

Encourage and ask everyone to make a gift. Offer virtual, at-home or safe in-person volunteer opportunities to connect their giving to real-life situations and experiences.

4. Thank

Make sure everyone feels appreciated for their generosity.

1. PREPARE

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 virtual meeting with your United Way development manager. We recommend using Zoom, Microsoft Teams or another video conferencing software (see page 26 for Zoom tips).
   - 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 Society, Builders Society, Women United and Atlantic Circle (see page 16 for more info).
   - Asking for a corporate gift or match.

4. Run the campaign.
   - Implement your digital campaign plan.
   - Publicize the campaign.
   - Ask employees for donations using online pledging.
   - Schedule virtual, at-home or safe in-person volunteer projects or "Day of Impact" activities.

5. Wrap up the campaign.
   - Say "thank you."
   - Report results.
   - Collect feedback and ideas to use next year.

United Way
United Way of Northeast Florida

Develop Your Digital Campaign Timeline

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

Annually

- ☐ Select an Employee Campaign Coordinator (ECC).

12 Weeks Before Kickoff

- ☐ Have first virtual campaign planning meeting with your United Way development manager.
- ☐ Meet virtually with past campaign team to discuss previous campaign successes and challenges.
- ☐ Conduct virtual executive briefing with senior leadership to choose campaign positions and responsibilities.
- ☐ Finalize steering team and campaign volunteer structure.
- ☐ Begin discussions about using Salesforce.org Philanthropy Cloud donor engagement platform, United Way's eWay electronic giving site or MobileCause text-to-pledge platform (see page 23 for more information on these digital campaign tools).

10 Weeks Before Kickoff

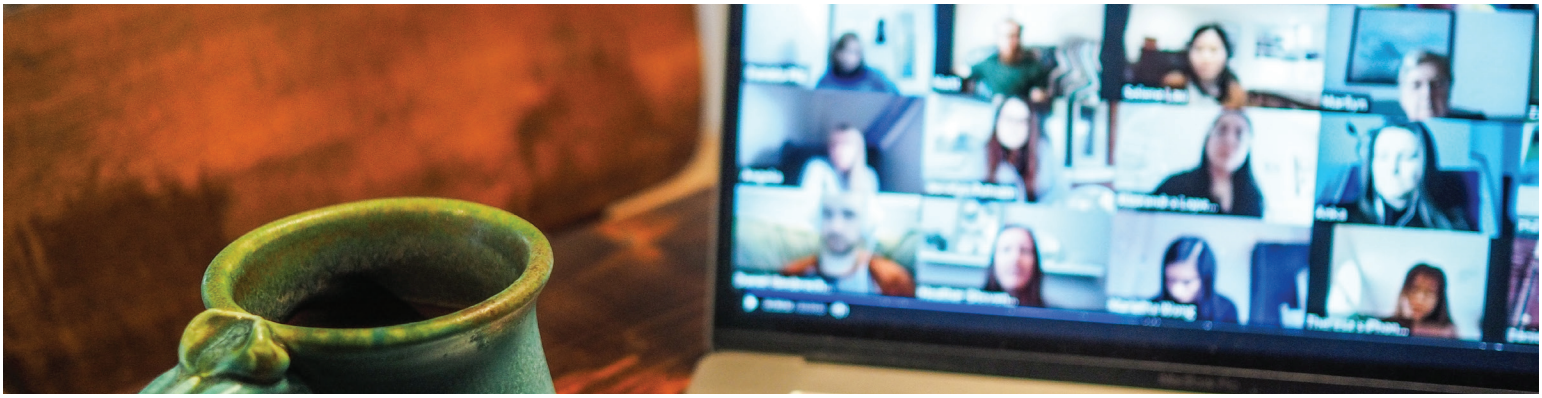
- ☐ Recruit additional campaign committee members.
- ☐ Begin virtual campaign team meetings (meet once per week until campaign). Campaign team meeting should include your United Way development manager to help develop specific objectives and strategies surrounding business units and special projects (campaign communications, volunteer activities, virtual kickoff and celebration, giving society campaigns and so on).
- ☐ Plan a calendar of virtual activities and events that connect employees to United Way's work and impact.
- ☐ Finalize discussions about your preferred digital giving platform.

Eight Weeks Before Kickoff

- ☐ Host a virtual meeting with a member of United Way's community impact team to determine your desired campaign impact focuses.Submit requests to United Way for any virtual volunteer projects.
- ☐ Submit requests for videos from our Digital Content Library or live virtual guest speakers.

Six Weeks Before Kickoff

- ☐ Set overall campaign goal.
- ☐ Develop giving society strategies, identify prospects and set virtual event dates.
- ☐ Finalize theme and communication plan.



Four Weeks Before Kickoff

- ☐ Execute campaign videos, web messages and other digital communications vehicles.
- ☐ Tell United Way stories through articles on your intranet website and internal email communications.
- ☐ Recruit volunteers for virtual or safe in-person volunteer projects.

Two Weeks Before Kickoff

- ☐ Have a virtual Tocqueville Society campaign event, and begin digital Tocqueville Society campaign.
- ☐ Have your Leadership Giving chair follow up with prospects.

One Week Before Kickoff

- ☐ Host virtual Builders Society, Women United and Atlantic Circle campaign events, and begin digital campaigns for those giving societies.
- ☐ Instruct Leadership Giving chair follow up with prospects.
- ☐ Begin virtual or safe in-person volunteer opportunities.

During Your Campaign

- ☐ Host general employee kickoff event on your preferred video-conferencing platform (see page 28).
- ☐ Deploy campaign leaders to talk about United Way with assigned employee groups, business units or departments, and ask them to consider participating. Use a video-conferencing platform for these conversations.
- ☐ Send initial pledge email and reminders, if appropriate.
- ☐ Share weekly campaign tracking report with campaign team.
- ☐ Host business unit events to raise awareness and increase participation in pledging.
- ☐ Continue virtual employee education meetings with United Way.
- ☐ Continue virtual and safe in-person volunteer opportunities.

After the Campaign

- ☐ Announce results to all staff on team-wide video conference call.
- ☐ Hold general virtual campaign celebration.
- ☐ Send appreciation emails to campaign leaders and volunteers.
- ☐ Thank donors who supported campaign using a thoughtful video or email message.
- ☐ Send your campaign results and donor information to United Way.
- ☐ Share results on company internal and external communication platforms, including social media. Tag @unitedwaynefl in your social media posts for a chance to be shared by United Way of Northeast Florida.
- ☐ Hold a virtual meeting to discuss campaign outcome and evaluate for next year.

Recruit Your Digital Campaign Team

Whether your campaign is completely digital or in-person, a thoughtfully assembled team of campaign volunteers is essential for 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 virtual event planning, speaker requests, digital 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 Tocqueville Society, Builders Society, Women United and Atlantic Circle campaigns.
- Assists ECC with communication to current and prospective Tocqueville Society, Builders Society, Women United and Atlantic Circle donors.
- Consider recruiting other team members to assist with a focus on increasing leadership members.
- Develops a list of prospects based on salary level, position and past giving history.
- Hosts a virtual Builders Society event, ideally separate from the Leadership event, such as a virtual happy hour, where Builders Society information can be presented.
- Consider recruiting other team members if it is an especially large effort.
- Hosts a virtual Leadership event, ideally separate from the Builders Society event, such as a Zoom webinar, 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.
- Hosts a virtual Tocqueville event, such as a Zoom social or virtual executive briefing.
- Follow up in a timely manner with each prospect.
- Highlights 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.
- Alternatively, consider using peer-to-peer solicitation for a personalized ask for support.

(see list of various virtual event and fundraising ideas on page 30)

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
Founded in 2014, Builders Society members are committed to building a better Northeast Florida with an annual gift of $2,500 or more. Builders Society is for donors who want to have a greater impact on our community. Members also participate in meaningful volunteer projects, unique networking events, a signature breakfast series with noteworthy keynote speakers, and exclusive invites to other United Way giving society events.

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
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.

INSPIRE

United Way
of Northeast Florida

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

Promote and Publicize

Storytelling and information are the keys to reaching your fundraising goal. Your United Way development manager will help you create a digital atmosphere of enthusiasm as you share with employees how their contributions help change lives in the Northeast Florida community.

CAMPAIGN PROMOTION TIMELINE

Before campaign:

- Raise awareness of upcoming campaign (see ideas list on page 18).
- Thank donors in email or a virtual meeting for their previous support.
- Share a schedule of virtual campaign activities.

During campaign, provide:

- Information about how to pledge.
- Schedule for virtual or safe in-person volunteer projects through United Way (see page 32).
- Success stories and personal stories through video, blog posts, recorded testimonials, etc.
- Digital-friendly messages asking for donations.
- Employee education.
- Compelling video from your team or United Way's Digital Content Library.
- Virtual live speaker from United Way's Speakers Bureau via a video conferencing system.
- Fun, interactive virtual events brainstormed with your campaign team and development manager.
- Information about incentives or matching corporate gifts.
- Host a United Way virtual poverty simulation.

CAMPAIGN PROMOTION TIMELINE (CONTINUED)

After campaign:

- Highlight campaign results.
- Thank donors for contribution.
- Host virtually 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 content from United Way's Digital Content Library. Let your development manager know if we can help craft your United Way story. Reach out to **mail@uwnefl.org** any time for tips and suggestions.
- Submit your United Way stories of corporate impact and staff assisted by United Way (only with the employee's permission) at **unitedwaynefl.org/submityourstory**.

PROMOTION IDEAS

- Company-wide virtual campaign rallies and events
- Internal, energetic email from your CEO or other leadership
- Ongoing email messages from your campaign chair
- Compelling intranet site content
- Virtual or safe in-person volunteer projects (see page 32 for ways to volunteer)
- Engaging videos from staff or United Way's Digital Content Library
- Email-friendly fliers
- United Way brochures and success stories, available in email-friendly PDFs and web links
- Employee testimonials (email, intranet site content or video)
- Company email newsletter
- Internal digital influencer campaign (email **jasmines@uwnefl.org** to learn more)
- Sharing your company's support on social media and tagging United Way of Northeast Florida using **@unitedwaynefl** on Instagram, Facebook and Twitter (company and personal accounts)
- Automated text messages (very limited) to boost key campaign pushes

3. ASK

Asking for a gift is by far the most important step of an employee campaign. The number 1 reason people do not give is because they were never asked. It is important to allow every employee to make an informed, personal decision about giving to United Way of Northeast Florida. Companies are not permitted to force/require their employees to give.

Giving

The most effective way to support improving lives and strengthening Northeast Florida is to give an undesignated gift to United Way. Your contributions are then maximized by investing in research-based, proven solutions that will have the biggest impact in helping people in Northeast Florida.

How To Ask

Include Everyone

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

Inform Employees

- Hold a virtual 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 virtual staff meeting.
- Create additional virtual meeting options or digital communications for employees who do not work at a desk or computer all day.
- Thank employees for their participationin your ask.
- Make individual peer-to-peer asks for support. This is especially effective when asking for a Tocqueville Society, Builders Society, Women United, Atlantic Circle or new employee contribution.
- Consider holding a special virtual meeting for new employees to allow for more background and information shared. Invite your United Way development manager to this virtual meeting.
- Highlight your company's corporate-level support, especially if your company has a program in place that matches employee donations.

Tips for Success

- Keep all meetings brief, lively and informative.
- Include a brief virtual training for your chosen giving platform with images, video or a quick webinar demonstration when possible.
- Share links to your giving platform multiple times in multiple areas (i.e. emails, intranet site, video messages, text messages, during virtual staff meetings (of any subject matter, department or meeting size) and in internal webinars, etc.).
- Text-to-give is available – ask your development manager to learn more.

4. THANK

The two most important words to remember and the ones donors appreciate most are “thank you.” Thanking everyone involved -- from donors to your campaign leaders to staff whovolunteered their time at community service projects -- cannot be overemphasized and goes a long way to ensure long-term support. There are two great ways to thank donors:

1. Thank donors through United Way.

Share details of who gave to the campaign so United Way can thank individual donors. Letting United Way thank donors directly will help connect donors directly to the impact they made possible by giving and also help your campaign going forward retain donors.

Moreover, donors who give more than $500 annually are eligible for membership in United Way giving societies. It is important to provide contact information for these donors to your United Way development manager so they can receive information about exciting events, networking activities and rewarding volunteer opportunities for which they qualify.

2. Thank donors through the workplace campaign.

- Mail personal thank you letters or e-cards to your employee donors from your CEO, ECC and/or Leadership Giving chair.
- Highlight all givers or givers of a certain level in a prominent digital space, i.e. intranet site, company digital newsletter or email, etc.
- Host a virtual event for donors who gave at a certain level.
- Give a special virtual gift to campaign team leaders and your campaign committee (see incentive ideas on page 30).
- Publicize full campaign recap and results via your company digital newsletter, email, intranet website and/or social media.

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 mailed checks, digital pledge cards and digital 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 do not use United Way pledge forms or one of United Way's online giving tools, provide your United Way development manager with donor details, such as names, preferred emails, preferred mailing addresses, gift designations (if applicable)and donation amounts for tax purposes and recognition, including United Way giving societies they qualify for if they indicated they want to join.
- Schedule a time with your United Way development manager to virtually review and discuss campaign results.

Debrief and Start Your Plan For Next Year

Getting an early start on 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 the incredible work of United Way inNortheast 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.

FAQS

How long should our digital 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 digital campaign take place?
Many campaigns take place August to November or February to May, but they can happen any time best suited for your company.

How can employees give?
Using a United Way of Northeast Florida digital pledge form or online giving platform, employees can give via payroll deduction, check, credit card or through stock. Donors can also give to United Way by phone. Speak with your United Way development manager for more information on all giving options.

What types digital content are available?
United Way of Northeast Florida offers a Digital Content Library, where you can choose the resources that are right for your campaign needs. Access the Digital Content Library at **unitedwaynefl.org/resources**. There, you'll find videos, PDFs of United Way brochures, branded video-conferencing backgrounds, email templates and more. Don't see something you need? Email **jasmines@uwnefl.org**.

What can I use to hold video conferences or virtual meetings and events?
If your company does not have access to a video-conferencing platform, United Way can help you set up Zoom or Microsoft Teams meetings for your campaign activities. Simply reach out to your United Way development manager for more information.

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 as early as possible as a team. Also, be sure to reach out to your United Way development manager any time 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, please reach out to your United Way development manager (see page 8 for staff listing).

KEY 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.

United Way's Digital Content Library
United Way of Northeast Florida's Digital Content Library is where you can choose to download the materials and files that will help you run a successful campaign. Access the Digital Content Library at **unitedwaynefl.org/resources**. The Digital Content Library contains videos, PDFs of United Way brochures, branded video-conferencing backgrounds, email templates and more.

Salesforce Philanthropy Cloud
Salesforce Philanthropy Cloud is a next-generation philanthropy platform that increases your brand's reach through innovative and direct philanthropic engagement. Features of the platform include a customizable homepage with content exclusive to your campaign; a built-in volunteer engagement module; detailed reporting on your campaign donor and volunteer activity over time; and a customizable content experience for your employees based on their philanthropic interests. Contact your development manager to schedule a demonstration for your company. If you would like more information about signing your company up for Salesforce.org Philanthropy Cloud, email Maureen Mercho, United Way of Northeast Florida's chief development officer, at **maureenm@uwnefl.org**.

E-Way Online Giving Platform
In addition to Salesforce Philanthropy Cloud, United Way offers an additional online-giving platform called E-Way. This platform can be customized with your company logo and digitally walks donors through their donation process. It also provides the company and United Way with a detailed report on their campaign donor activity.

Text-to-Give
United Way offers text-to-give messages that allow employees to easily access a company's giving platform or other desired webpages. Talk to your development manager to learn more.

United Way's Website
Visit **unitedwaynefl.org** to learn in-depth about our work and the change we make possible thanks to your support. You can also download materials, read success stories on our blog, and find even more ways to make a difference through United Way. Be sure to bookmark our helpful campaign toolkit at **unitedwaynefl.org/corporate-engagement**.

United Way's Social Media
Be sure to follow **@unitedwaynefl** on social media – and encourage your company's colleagues 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**. We'd love to share your United Way stories.

For any additional questions, please reach out to your United Way development manager (see page 8 for staff listing).

DIGITAL CAMPAIGN TOOLS AND TIPS

Running a Virtual Campaign Kickoff

A virtual kickoff has many benefits for a United Way workplace campaign.

Virtual Meeting Best Practices

Make the most of your virtual interactions.

Virtual Fundraising and Incentive Ideas

Fun ideas to boost your campaign.

VIRTUAL MEETING BEST PRACTICES

Make the most of your interactions with employees with the following tips and guidelines.

Ask the Right Questions

- **Determine the Need:** Why am I hosting this gathering? What value am I adding? From the employee's perspective, what are they gaining? Why is attending this call more important than homeschooling their child?
- **Choose Your Content Carefully:** How can I make this engaging? What tools can I use to keep people interested? What are my goals in hosting this gathering?
- **Be Sensitive, Very Sensitive:** Am I keeping current issues (COVID-19, local community issues/needs) in mind? Am I listening and saying "how are you, how can I help?"
- **Craft Your Event:** Who am I going to invite? How am I going to invite them?
- **Choose Your Tech:** Do I need capability to mute people? Do I need breakout capability? How will they get the link to join?
- **Plan Your Day:** Do I have a well-lit place with good Wi-Fi? Will I be on video? Will others be on video? What do I do if tech fails me?
- **Gather Your Team:** Who will be speaking? Who will be answering questions in the chat? Who will help with the tech? Who will send invitations?

Define your goals

- Why are you having this event? What do you hope to accomplish? What type of event is this?
- How many attendees do you want online?
- Are there specific people you are trying to connect with?
- What story do you want to tell at your event?
- Think about what you want attendees to leave with. A changed perspective? An inspiring story? Connection with like-minded people? Craft your agenda with those goals in mind.

RUNNING A VIRTUAL CAMPAIGN KICKOFF

As you begin your United Way workplace campaign, a virtual kickoff has many benefits.

- **Ready, Set, Go!** A virtual kickoff clearly marks the start of your United Way effort creating a sense of urgency and a timeline for colleagues. Campaigns with kickoff events have proven to raise more dollars in support of our community.
- **Inspiration.** The kickoff provides employees with an opportunity to hear about the impact of their donations and be inspired, so they can make an informed decision about giving.
- **Team Building.** This is a great chance to bring employees together in a common cause of caring and build morale, which is especially important in a time of social distancing.
- **Stage Setting.** It demonstrates the passion your organization, your senior management team and your colleagues have for the campaign and supporting our community.

Your United Way development manager is here to support you and can help you plan and customize your kickoff event. We have created tools and resources to support you in hosting one your kickoff virtually.

How To Get Started

KEY CONSIDERATIONS AND PLANNING

1. **Technology Platform**
   Confirm the online web conferencing platform that is approved by your workplace and learn about the platform's functionality, so that your United Way development manager can help you build your kickoff agenda and activities on the platform. If you cannot host your kickoff on your own technology platform, speak to your United Way development manager.
2. **Senior Management Support**
   Support from your Executives is critical to showing your organization is behind the campaign. Book their time so they can participate in your virtual kickoff, or see if there may be existing meetings you can piggyback on. See Appendix B for suggested talking points and presentation content that your senior management team can personalize.
3. **Consider your Audience**
   For best results, we recommend a kickoff event is scheduled for no longer than 30 minutes. If your employee base is large, you may consider hosting a series of kickoffs (e.g. by department) throughout the day, or across a few days. While there is no ideal, you want to strike a balance between being able to reach all your employees, and helping people be comfortable enough to ask questions and interact.
4. **Determine the Meeting Host and Other Company Speakers**
   It is best if the Employee Campaign Chair (ECC) acts as facilitator to ensure your kickoff sticks to the agenda. If the ECC needs support, your United Way development manager can act as co-host. Invite your CEO or other executive(s) to take part and speak, too, as their leadership can inspire others and demonstrate support of United Way from the top down.

5. **Make it Interactive**
   Engage your colleagues during the kickoff. Consider interactive activities like online polls or quizzes to keep their attention online. Your United Way development manager can help you build this activity.
6. **Raise Awareness about Impact**
   United Way has speakers that can join your virtual meeting and online awareness activities like our online poverty simulation and campaign videos can help share the impact of donations and inspire people to give. Your United Way development manager can help you select the best awareness-building activities for your agenda.
7. **Set Clear Action Steps**
   Let people know how they can donate and/or how they can get involved in the campaign. We recommend sending your donation link immediately following your kickoff event, so people can take action while they're feeling inspired.

Need a live, virtual United Way Speaker for your event? Please contact your United Way development manager and submit your speaker request at least 10 business days prior to your event. Prerecorded videos of speakers are also available.

RECOMMENDED KICKOFF AGENDA TEMPLATE

We welcome you to make use of the following template agenda as you plan your event.

What/When/Who	Content
Opening 5 mins CEO/ECC/Sr. Leaders	• Welcome • Value of United Way and company partnership • Importance of United Way now • Encourage all to get involved with campaign activities • Interactive poll or quiz to get people engaged
United Way Awareness Activity 7-12 minutes Facilitated by United Way	Activity examples: • Online poverty simulation (may take longer than 12 minutes) • United Way and company quiz • Group whiteboard sharing (e.g. "What are our community's toughest challenges? How can we work together to LIVE UNITED?") • United Way videos • Guest speaker from United Way
Closing remarks 5 mins CEO/ECC/Sr. Management	CEO/ECC to thank participants, and reiterate importance of United Way • Call to action/donate now • Share company fundraising/participation goals • How to give • Instructions on next steps – donation

Zoom Best Practices

BEFORE EVENT

- Choose Meeting vs. Webinar: use Meetings only for collaborative events. Webinars are designed so that the host and any designated panelists can share their video, audio and screen with view-only attendees. Attendees have the ability to interact via Q&A, chat, and answering polling questions.
- Ensure your Zoom license allows for the duration of event and number of attendees you expect to join.
- Download the Zoom desktop app and ask guests to do the same.
- Test your Zoom audio and video.
- Review how to share your screen.
- Create Zoom meeting for event and include details in meeting invite or RSVP reply (including a meeting password).
- Schedule a test Zoom with your speakers prior to event.
- Make sure your background is clear of distractions (and be careful of background noise).
- Consider using a headset for better sound.

DURING EVENT

- Host should join 15 minutes early to test platform.
- Enable video for face-to-face interactions.
- Make other speakers a co-host (click Manage Participants, hover over name of participant and select More and Make Co-Host).
- Always record.
- Share housekeeping details with attendees upfront (including letting them know that the meeting is being recorded).
- Mute participants during webinar (to mute everyone, click Manage Participants and select Mute All).
- Use Chat Box for questions.
- Close out of non-imperative apps while Zoom is running.
- Use poll questions periodically to engage your audience and keep them focused.

Timeline Leading-up to Virtual Event

Activity	Recommended Timing
Confirm event theme	6-8 weeks prior to event
Secure speakers	6 weeks prior to event
Finalize a date	6 weeks prior to event
Identify list of invitees	5 weeks prior to event
Create event agenda	5 weeks prior to event
Create email template and event registration page	5 weeks prior to event
Send first round of invites	4 weeks prior to event
Prepare content with speakers, ensure presentation is on track	3 weeks prior to event
Test digital platform to ensure proper functionality and capabilities	2-3 weeks prior to event
Second round of invites - follow up with calls and one-off emails	1-2 weeks prior to event
Send thank you email with post event	1 day after event
Recap call to gather event feedback	3-4 days after event

Post Virtual Event Follow Up

- Download the Chat box and respond to any unanswered questions.
- Create and send follow up email. Include:
  - Post event survey
  - Presentation slides
  - Contact information
  - Call to action
  - Next steps
- Share images, quotes, and information from the event on your social media channels.

VIRTUAL FUNDRAISING AND INCENTIVE IDEAS

All these events can be done free of cost to your employees, or you can use them as an additional fundraising opportunity. Employees could pay $10 to be part of on online fitness class. All those who donate at least $5 a paycheck could be invited to a virtual happy hour with the CEO. For more fun ideas, contact your United Way development manager.

1. Host virtual activities or lessons and consider charging $5-10 donations to participate.
   - Cocktail lesson from a mixologist
   - DJ class
   - Dance lessons for couples
   - A group workout class
   - Wine tasting
   - Flower arranging
   - Cooking class
   - **Bright Idea:** Ask the CEO to join these activities to show his/her support of the campaign.
2. Book a musician or a magic show for employees to watch online with their kids or family.
3. Have a LEGO build competition where the most votes wins. Consider letting the employees' kids have a category as well.
4. Auctions for experiences to be used once employees return to the office, or for things that can be done virtually. Consider hosting on an online site like 32 Auctions or Charity Auctions Today.
5. Raffles for PTO, restaurant or UberEats gift cards.
6. Host a virtual Golf Tournament. Suggestions for how to execute this can be found here: **perfectgolfevent.com/virtual-golf-tournament-fundraiser**.
7. Run a virtual 5k. Participants agree to run the same distance on the same day. Times are submitted to a designated person and the fastest time wins. Consider having age categories like an in-person 5k.
8. Raffles for virtual happy hour with the CEO
   - **Bright idea:** Everyone who pledges during the campaign is entered into the raffle. This encourages recurring gifts rather than one-time smaller donations.
9. Zoom Bingo or Trivia competitions.
10. Host an Xbox or Playstation video game tournament.
    - **Bright idea:** Ask the CEO to play the winner, or play employees for their donation of $10 a game.

11. Challenge coworkers to a lip sync competition.
    - **Bright idea:** The video with the most votes ($5 donations) wins!
12. Send employees three ingredients to use in a cooking competition. Consider categories like most creative, most beautiful and most inedible.
13. Have a talented colleague host a Family Paint Night. Compare paintings at the end of class to see how they all turned out.
14. Host a Mini Golf Design Competition. Each participant designs a hole with household objects and shares via video. Award prizes for most creative, most challenging, most detailed, etc.
    - **Bright idea:** Consider asking competitors to pay an entrance fee to compete.
15. Do a Corporate Step Challenge. Have the CEO pledge a gift or corporate gift if employees can all work together to reach a certain number of steps within a week.
16. Consider a Virtual Book Club with $10 dues.
17. Host an amateur art or photography festival and have participants enter their art. Turn it into a contest, where attendees can give $5 to cast votes for their favorite films/photos.
18. Do a virtual food drive from an Amazon list and send notes to a United Way partner.
19. Choose a day to wear a costume from your closet on a video call with coworkers. Best costume wins a prize!
20. Know a local celebrity or friend with a unique pet? Ask them to crash a video meeting.
21. Have employees donate items to an online yard sale with proceeds benefiting United Way.
22. Virtual Scavenger Hunt. Using video conferencing tech, the facilitator announces an item for participants to search their house for. Participants turn their camera off as soon as a search item has been announced. The first one to turn their camera on and display the item gets the points.

Incentive Ideas

1. Throw a pizza party for remote teams using e-gift cards or delivery services like Door Dash.
2. Host virtual movie days using the Netflix Party browser extension on Chrome.
3. Create Amazon Wish lists for incentives. Team members can select their prize and have it shipped to their address.
4. Virtual dinner with your coworkers or company leadership sponsored by your company.

VOLUNTEER OPPORTUNITIES

Change doesn't happen alone – and virtual or safe in-person volunteering is a great way to engage your team during your campaign. 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, and there are many opportunities that can be completed virtually or safely in-person.

Benefits of volunteerism

- Provide a meaningful service to the community
- Improve skills and develop new ones
- Gain a deeper sense of purpose
- Support a cause you're passionate about
- Exercise and reduce stress
- Feel happier and more connected to your community
- Enjoy time with like-minded community members
- Feel a sense of pride and accomplishment for your community

You can volunteer in two ways through United Way of Northeast Florida:

Group Volunteering

United Way can help connect your employee teams, social groups, service organizations, families or friends to meaningful remote, virtual or safe in-person volunteer experiences that change lives in Northeast Florida. Whether it's one-day activities or quarterly projects, our staff is available to assist you through the entire process For more information about Group Volunteer projects, visit **unitedwaynefl.org/group-volunteer**.

Individuals

United Way and our partners have many individual remote, virtual or safe in-person volunteer opportunities across Northeast Florida. Visit **unitedwaynefl.org/volunteer** to get involved today.

*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 volunteer projects, visit **unitedwaynefl.org/group-volunteer**.

DIY – Do-It-Yourself Volunteer Projects
These remote or virtual volunteer projects allow individuals, students, families, and groups of all ages and sizes to participate in flexible yet impactful community service opportunities that always work with their comfort-level, schedule, numbers, budget and can be accomplished even from the comfort of their own homes. Each project helps to alleviate a crucial need in the community, and can include opportunities such as kits, drives, and virtual roles such as a video guest speaker for students. Register for an opportunity at **unitedwaynefl.org /remotevirtual-volunteer** and you will be contacted with further details by the volunteer and community engagement team.

Focus-Area Projects
If your team is comfortable with safe, in-person projects, there are a number of partners working in basic needs who are in need of volunteers on prescheduled dates. Currently these projects are limited to groups up to 10 in size to accommodate social distancing guidelines. To explore these opportunities and sign up, visit our volunteer calendar at **unitedwaynefl.org/volunteer-calendar**.

Projects-in-a-Box
Host a volunteer event at your office, community facility or home. All of United Way's projects-in-a-box budgets include the purchasing and coordination of all the supplies; transportation of items to the location of your choice; set up and break down; one or more staff members to explain the significance of the project and the impact on the recipientsand to lead the event; and transportation of the finished items to the recipient agency. All budgets are based on a standard, 2-hour project, but can be customized further to suit your needs. View a list of custom projects we can host at your location and budgets at **unitedwaynefl.org/projects-in-a-box**.

Virtual Breaking the Cycle Poverty Simulation
One unique experience coming soon is our virtual Breaking the Cycle Poverty Simulation, which takes on the identity of a low-income family living on a limited budget and challenged to effectively allocate resources over a four-month period. This virtual exercise is a great way to learn more about hard working families who struggle every day. Following the exercise, participants will share feedback about their experience during a debriefing session.

Signature Events
Whether with a group or on your own, United Way and partners collaborate on a number of annual community-wide signature events. Learn how you can be part of these exciting yearly efforts by visiting **unitedwaynefl.org/volunteer-signature-events**.

HOLIDAY PROJECTS

Thanksgiving Baskets
Thanksgiving Baskets are a seasonal program, available in November which matches families in need within our Full Service Schools network with caring sponsors across the community. Many families would not have access to an adequate meal for Thanksgiving if not for the generosity of corporations, community members and organizations in Northeast Florida.

Families are identified by early November and sponsors can begin expressing interest in participation shortly thereafter on **unitedwaynefl.org/volunteer**. Once sponsors have registered, matches are typically made within 2-3 business days. To help us spread Thanksgiving cheer, email **volunteer@uwnefl.org**.

Adopt-a-Family
Adopt-A-Family is a seasonal program matching families in need within our Full Service Schools network with caring sponsors across the community. Sponsors are provided with the family's Wish List and purchase gifts, clothing, and/or food to help brighten their holiday.

Families are identified by early November and sponsors can begin expressing interest in participation shortly thereafter on **unitedwaynefl.org/volunteer**. Once sponsors have registered, matches are typically made within 2-3 business days. To learn more about the Adopt-a-Family Project, email **volunteer@uwnefl.org**.

Custom Projects
If any of the group volunteer options don't meet your team's needs, United Way can customize a project based around your availability, interests, budget and group size. To set up a custom project today, please contact Erica La Spada at **erical@uwnefl.org**.
Note: All customized projects require a fee to cover the cost of any materials, transportation and staff time as determined by project type and group size

Individual Volunteer Opportunities

For employees looking for meaningful, ongoing ways to volunteer on their own at home or safely in-person, United Way has a number of options. Simply visit **unitedwaynefl.org/volunteer** to get involved today.

In addition to many of the same opportunities available with group volunteering, individuals have a few additional choices:

Ongoing Volunteer Opportunities
Our community partners have ongoing volunteer opportunities that are available for Individuals to perform virtually or safely in-person. With ongoing needs, our community partners are always looking for volunteers to perform a variety of projects, but often are looking for individuals who can help out on a regular basis, usually with at least a 6 month commitment.

Ongoing opportunities do not have an end date and are readily available with few time constraints. They can be skills based and are perfect for individual development. Additionally, these opportunities enable volunteers to assist with a crucial need in the community, help build capacity for agencies and allow the volunteer to build a relationship with the recipient organization. Learn more at **uwnefl.galaxydigital.com/remotevirtual-opportunities**.

*All individual inquires for volunteerism through United Way should be directed to the Volunteer and Community Engagement team at **volunteer@uwnefl.org**.*

*For more information about company or individual volunteer opportunities, please visit **unitedwaynefl.org/volunteer**, or contact the Volunteer and Community Engagement team at **volunteer@uwnefl.org**.*

United Way
ievers For Life

READY TO HELP NORTHEAST FLORIDA RECOVER?

Contact your United Way development manager today (see page 8).

THANK YOU

for making a difference through United Way of Northeast Florida.

BECAUSE CHANGE DOESN'T HAPPEN ALONE.

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