



CAMPAIGN COORDINATOR TRAINING GUIDE

**TOGETHER WE'RE GREATER
THAN ANY CHALLENGE.**

LIVE UNITED



uwssc.org

Give. Advocate. Volunteer. Donate.

**BECAUSE OF YOU
THERE IS A WAY**



South Sarasota County

**All Funds Raised Here Stay Here - South Sarasota County
Osprey | Nokomis | Laurel | Venice | Englewood | North Port**



THANK YOU FOR LEADING THE FIGHT

We all have the potential to make the world a better place and make a difference in our community. By becoming a Campaign Coordinator for your workplace's United Way South Sarasota County annual campaign, you've committed to joining the fight to take on our community's toughest challenges. It takes a special person to manage a workplace fundraising campaign; a person with teamwork and leadership skills, creativity, enthusiasm, and compassion; who understands the United Way mission and believes that together we can make a connection, make things better and be a part of something bigger.

Thanks to people like you who take on this role, we are working to break the cycle of generational poverty by helping children graduate and helping families become financially stable. We also hope that it makes a difference in your life, as it has for so many others who have taken on this leadership role.

This guidebook is full of ideas and information to help you manage a successful campaign. Remember, your Relationship Manager is just a phone call or email away with additional support and direction.

Thank you for being that special person that we need to make a difference in our community!

**- United Way South Sarasota County
Board of Directors and Staff**

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MODERN UNITED WAY BLUEPRINT

South Sarasota County



South Sarasota County

Venice, North Port, Englewood, Nokomis, Laurel, Osprey

LEAD WITH A GROWTH MINDSET

MODEL DIVERSITY, EQUITY AND INCLUSION

UNDERSTAND
THE
COMMUNITIES
WE SERVE

→ ENGAGE THE
COMMUNITY
IN SOLVING
RELEVANT
ISSUES ←

→ DELIVER
AWESOME
EXPERIENCES ←

→ ENGAGE AND
STRENGTHEN
CHANNELS
YEAR
ROUND ←

BEST IN CLASS > FUNDRAISING > CONTENT >
DIGITAL EXPERIENCES > VOLUNTEER OPPORTUNITIES

LEVERAGE PEOPLE,
PROCESS AND TECHNOLOGY

EFFECTIVELY LEARN
BY USING DATA

A Modern United Way:

- reflects the community in philosophy, policy and participation.
- is insight and data driven – not how we think it is; how we know it is.
- offers unparalleled service, solutions, content and engagement.
- leads with a growth mindset leveraging team talent in conjunction with technology to empower our organization.
- continues to embrace the power of collective fundraising to increase the impact of any gift large or small.



South Sarasota County

MODERN UNITED WAY BLUEPRINT

A WAY FORWARD.

United Way South Sarasota County had adopted a MODERN UNITED WAY BLUEPRINT to assist in addressing the needs of the community in South Sarasota County.

UWSSC primarily focuses on funding programs that support the ALICE (Asset Limited Income Constrained Employed) population.

United Way of South Sarasota County Mission

United Way of South Sarasota County improves lives by mobilizing the caring power of the collective communities of: Venice, Englewood, North Port, Laurel, Nokomis, and Osprey to fund local programs that help fight for healthcare, education, and financial stability for members of our community.

Vision

A community united where all residents have equal opportunities for success.

Community Impact

The modern United Way of South Sarasota County (UWSSC) provides leadership in creating innovative strategies that address the needs of our community, and through impact initiatives and community collaborations we jump start solutions to those needs in the following areas:

- Health & Well Being of Adults and Children with Special Needs-
- Strengthening Individuals, Families & Children
- Crisis Intervention for Children & Adults
- Assisting the Elderly

Values

Values are the fundamental beliefs that help guide our organization.

Integrity

With transparency our actions will always support our mission.

Stewardship

The careful and responsible management of donor funds, volunteer time, and resources.

Diversity, Equity & Inclusion

Making diversity, equity, and inclusion central to our mission, increases philanthropy and has greater impact.

Innovation

Continual development of creative strategies that will adapt to the changing needs of our community.

Collaborations

Applying trust, respect, willingness, empowerment, and effective communication in building relationships with our community partner and business community to make a greater impact.

#EssentialALICE

YOU DO KNOW ALICE

Diana works 2 jobs, she goes to school part-time in hopes of obtaining a higher-wage job, to give her daughter a chance at a better life. A single mother, she is ALICE.

ALICE stands for Asset Limited, Income Constrained, Employed. ALICE can be an office worker, a personal care aid or nursing assistant, a childcare worker or an elementary teacher, a retail associate or custodian, even your delivery man. They are our friends, family and neighbors who go to work every day, but struggle to meet their basic costs of living: Housing, transportation, healthcare and childcare.

ALICE is one emergency, car repair or doctor visit from poverty.

YOU CAN HELP. GIVE TODAY.

#UnitedforALICE

WHO IS ALICE?

ASSET LIMITED
ALICE has no safety net for emergencies

INCOME CONSTRAINED
ALICE's income falls short of basic necessities

EMPLOYED
ALICE is working, but can't afford the cost of living

2.6 MILLION
Floridian's have incomes that exceed the Federal Poverty Level, but cannot pay for basic needs. When you add in households that live below the Federal Poverty Level, that's **3.6 million** people in Florida.

46%
of Florida households are struggling to survive

38%
of the households in South Sarasota County, are at ALICE or below the Federal Poverty Level.

YOU CAN HELP. GIVE TODAY. #UnitedforALICE

#EssentialALICE

YOU DO KNOW ALICE

James and Elise are new parents who dream of a better life for themselves and their daughter. James is a security guard and Elise works retail. They earn just enough to be above the poverty threshold, which means that they don't receive any government assistance, and they need it to help with basic needs. They are ALICE.

ALICE stands for Asset Limited, Income Constrained, Employed. They are our friends, family and neighbors who go to work every day, but struggle to meet the basic costs of living: Housing, transportation, healthcare and childcare.

ALICE is one emergency, car repair or doctor visit from poverty.

YOU CAN HELP. GIVE TODAY.

#UnitedforALICE





GIVE.

ADVOCATE.

VOLUNTEER.

DONATE.

UNITED WAY OF SOUTH SARASOTA COUNTY



Community Impact Facts 2020

EDUCATIONAL PROGRAMS – GAVE 13,536 RESIDENTS:

The opportunity to attend preschool, after school care programs and summer programs so that parents may continue to work knowing their children are safe, get homework help, and make friends for a sense of belonging and community.

A chance to participate in day programs with focus and purpose, to get literacy help, respite services and clinical supports. A chance to begin generating lasting solutions from isolation, to develop lifelong strategies for a better opportunities in life.

HEALTH PROGRAMS - ALLOWED 40,925 CITIZENS:

To get needed food, hygiene products, medicine, counseling and access to health and dental clinics, when they may not have been not afforded. Allowing them to flourish by promoting less risky behaviors and healthier lifestyles.

To help support and protect abused and neglected children. To assist our frail seniors in need who are home bound or unable to cook themselves. To close the ranks on isolation, abuse and scam artistry that exploits our at-risk our neighbors.

To assess information and referral hot lines that connect citizens with area resources that can improve their quality of life. Our community thrives when all of our neighbors have access to updated resources that can lead them to a better quality of life and affordable care.

To have access to necessary psychological, health and personal safety assessments. Special needs adults and children so gained access to special training along with mentoring programs that improved, strengthened and empowered their lives for the better increasing their opportunities to thrive and succeed with less stigma.

FINANCIAL STABILITY PROGRAMS – ASSISTED 3,774 INDIVIDUALS:

With legal advice, foreclosure help, scam alerts, free tax assistance and social services resources which improved their financial stability and independence with programs that stimulated their financial futures. We accomplished this with the help of our robust funded program partners.

In accessing program aids and client service referrals that gave a hand up during a short term crisis or natural disaster, which allowed them the time to establish a better plan. We connected individuals in connecting with a social service specialist helping lead them to utility resolutions and other helpful financial resources, preventing them from becoming homeless.

58,235 lives were impacted by investing in Venice, Osprey, Laurel, Nokomis, Englewood and North Port Communities.



BECAUSE OF YOU
THERE IS A WAY



South Sarasota County

YOUR CAMPAIGN

The first rule of fundraising: ask

You raise money when you ask for it. Remember, you are providing the opportunity for people to make a difference and be part of a group of people committed to changing our community for the better. Don't be afraid to ask. Your focus is on people helping people. The most successful workplace campaigns have the early and full support of the company's CEO.

- Prior to beginning your campaign, meet with your CEO and other top executives within the organization.
- Establish a timeline and budget with CEO feedback.
- Ask your CEO to send personal correspondence (i.e. letter, email, payroll insert, etc.) to each employee asking for campaign support and contribution.
- Follow up with a letter, email, or phone call thanking each employee for his or her gift.
- Arrange for your CEO to speak at your campaign kickoff celebration.
- Ask your CEO and/or other top executives to be present at campaign meetings and attend campaign activities.
- Ask your CEO and other executives to join you in kicking off the campaign by making the first leadership pledge (\$1,000+).

Setting your goal

A workplace goal provides an incentive to give and measure success. Set a workplace goal to encourage an increase in giving year over year. The worksheet included here can help you calculate your company's investment potential.

FIVE STEPS TO SET YOUR GOAL					
1	Calculate your company's total dollar potential using one of these two formulas	A.	.01 x Total Payroll	=	
		B.	.01 x Average Annual Salary x # of employees		
2	Amount raised last year				
3	Percent of total potential achieved				
4	This year's goal				
5	Percent of potential goal				

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BECAUSE OF YOU
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THE CAMPAIGN PLANNING MATRIX

Task	Date Completed	Notes
Meet with your Relationship Manager for a planning meeting.		
Obtain CEO endorsement and support.		
Appoint Workplace Campaign Coordinator and recruit campaign committee.		
Appoint Leadership Giving Chair and recruit leadership committee.		
Secure a corporate gift or corporate match commitment.		
Determine electronic and/or paper pledge tool and personalize pledge forms.		
Request CEO/management appear at kickoffs, rallies and presentations.		
Develop detailed timeline.		
Develop campaign plan: Set goal		
Determine marketing strategy		
Choose campaign methods		
Set incentives		
Establish/continue leadership giving program		
Arrange agency speakers and tours		
Plan special events (<i>See Little Book of Event Ideas</i>)		
Plan company leadership meetings and kickoff event.		
Send e-mail communications to notify staff of campaign activities.		
Send letter from top executives to all employees encouraging participation.		
Calculate results to include total dollars, number of donors, number of employees, and leadership givers.		
Report final results to your Relationship Manager during an audit.		
Thank campaign committee and employees with events and letters. Be sure to report results.		
Year round employee engagement planning.		
Share thank you letters and ongoing updates from United Way South Sarasota County with employees.		



**Remember to reach out
to your United Way Relationship Manager, Erin Lilly, for questions!
941.525.4128 or development@uwssc.com**

STEPS FOR A SUCCESSFUL CAMPAIGN

Use the tools we provide

- Posters
- Rack cards/brochures
- Table tents for breakrooms and conference rooms
- Campaign stickers
- PowerPoint presentations
- Sample letters
- Fundraising event ideas
- eNewsletters – monthly
- Videos and stories - quarterly

Recruit your team

- Recruit team members from all departments, levels, locations and professional talents.
- Invite team members to attend the Campaign Coordinator Workshop with you.
- Include your United Way staff contact in team meetings so you can tap into that person's expertise.
- Include your Marketing and HR team for your internal communications plan.
- Review prior campaign practices and brainstorm new ideas with your team.
- Establish specific duties for each member and develop a strategy and timetable for reaching your fundraising goals.

Promote and educate

- Provide educational opportunities, such as company-wide campaign kick-off meetings/rallies.
- Identify an employee who is willing to provide a personal testimony in print or at presentations/rallies.
- Share videos from **United Way South Sarasota County** YouTube account.
- Use employee publications, intranet, voice mail, announcements, bulletin boards, email, management endorsement letters, newsletters, paycheck stuffers and social media to spread the United Way message.

Hold a campaign kickoff meeting and make the ask

- Employee kickoff meetings are the most effective way to reach all employees and can take as little as 10-15 minutes.
- Start a great campaign by offering incentives to attend.
- Make sure employees know the purpose of the meeting in advance.
- Distribute rack cards and pledge cards as employees arrive.
- Invite a United Way staff member or executive to speak at the event.
- Ask your CEO to attend and publicly endorse the campaign.
- Showcase videos and client success stories.
- Keep the meeting lively, informative and fun.
- Make the ask!
- Thank employees for their participation and follow up with employees who were not able to attend.

We are here to support YOU!

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Strategize and use incentives

- Set participation rate as a company goal.
- Hold a raffle for everyone who participates (prime parking spots, days off, gift cards, etc.).
- Hold competitions between stores/branches/locations/departments based on participation rate.
- Offer a casual day to everyone who donates.
- Host a wrap-up party and thank everyone who participated.
- Hold special events like golf tournaments or a 5K race for the community.
- Monitor your campaign and report results.
- Keep regular totals and give progress reports to your team, your United Way staff contact and your CEO.
- Publicize campaign results throughout the organization.
- Follow up with all employees. Have all pledge cards returned to you, even those where the individual has not made a gift. This helps you track contributions.
- Make sure that pledge cards are filled out and signed and that the total amounts are accurate.
- Give completed report envelopes, including signed pledge forms, to your United Way staff contact.

Say thank you

- Recognize your team and others who volunteered their time.
- Thank employees for their participation, time and support; a thank you letter from the CEO is particularly effective.
- Publicize your results via email, voice mail, intranet, newsletters, social media, etc.
- Celebrate your success!

Engage employees year-round

- Use the Engagement Calendar provided on pages 13-15 for more ways to keep employees involved with **United Way South Sarasota County** year round. Donors have indicated that they want to know the impact of their investment dollars. Stay connected with us year-round to hear updates on our work. Sharing these updates will help make next year's campaign just as successful or even more successful.
- Share the benefits of being a friend of United Way. We offer discounted tickets to local sporting and other events, be sure to share this with your company employees.
- Identify next year's Campaign Coordinator if you are able, and share their information with your United Way staff contact.
- Start a new hire program that gives new employees the opportunity to make a contribution when they join your organization (your United Way staff contact can help you get started).



**Remember to reach out
to your United Way Relationship Manager, Erin Lilly, for questions!
941.525.4128 or development@uwssc.com**



Administration Center Main Entrance



CREATE ORGANIZATIONAL

IMPACT YEAR-ROUND

Engage your team

United Way South Sarasota County can be part of your corporate social responsibility plan. We offer your team a variety of engagement and professional programs.

- Workplace Lunch N' Learn
- United Way South Sarasota County Impact Reports and Stories
- Donors invited to United Way Leadership and/or Affinity Groups (Women United, Young Leaders' Society)
- Custom Volunteer Activities
- Sports Team Ticket Events
- Alexis de Tocqueville Society
- Loaned Executive Program
- Volunteer Board/Committee Membership

ENGAGEMENT CALENDAR

2 MONTHS BEFORE your campaign starts

- Schedule a planning meeting with your United Way Relationship Manager (RM)
- Create your campaign committee
- Choose campaign dates
- Plan your kickoff and fundraising events

1 MONTH BEFORE your campaign starts

- Hold a meeting with your leadership team to get their support and participation in events
- Share campaign with staff and invite to take quiz
- Schedule a speaker for your kickoff event (through your RM)


CAMPAIGN LAUNCH and up to 2 weeks prelaunch

- Put campaign collateral (posters, flyers, rack cards, etc.) in common areas of workplace. Send pre-campaign launch and campaign launch letters (provided by United Way or customizable) via email, intranet, newsletter or all of the above; include video where applicable
- Hold your kickoff meeting and share campaign video
- Pass out pledge cards or send emails directing employees to company epledge page

2 WEEKS TO 1 MONTH after campaign

- Send thank you letter, along with results, to all donors
- Share thank you video with staff (provided by United Way South Sarasota County)
- Conduct final audit with RM

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Osprey | Nokomis | Laurel | Venice | Englewood | North Port



As a United Way donor, you and
your colleagues are part of
a community of people committed
to making a difference.

SAMPLE ENGAGEMENT CALENDAR

Below are suggestions for activities and events you may want to share or engage in yourself throughout the year (note the X for suggested timing). Watch your Campaign Coordinator newsletter for ideas and stories to place in/on your employee newsletter or Intranet. Talk with your United Way liaison for more ideas and suggestions on how to best communicate the impact you and your organization are making on our community through United Way.

ENGAGEMENT OPPORTUNITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Share volunteer opportunities with coworkers	X	X	X	X	X	X	X	X	X	X	X	X
Hold a HandsOn orientation at your workplace	X	X	X	X	X	X	X	X	X	X	X	X
Agency tours	X	X	X	X	X	X	X	X	X	X	X	X
Affinity Groups (Attend a Women United event)	X	X	X	X	X	X	X	X	X	X	X	X
Host a donation drive - school supplies, literacy kits and more	X	X	X	X	X	X	X	X	X	X	X	X
Hold a literacy (or other) Lunch N' Learn event	X	X	X	X	X	X	X	X	X	X	X	X
Connect with us on Facebook, Twitter and Instagram	X	X	X	X	X	X	X	X	X	X	X	X
Watch your inbox for your monthly e-newsletter	X	X	X	X	X	X	X	X	X	X	X	X
Subscribe to general e-newsletter	X	X	X	X	X	X	X	X	X	X	X	X
Share video stories provided by United Way South Sarasota County				X			X			X		
Day of Caring - a volunteer day for companies										X		
Night of Caring										x		
HandsOn Day of Service	X											
Day of Action (A United Way Worldwide event to spruce up local communities; we can help you design a company-specific project)						X						
Share special contests and promotions (dates vary)												
Give Day- online giving opportunity					X							
The Giving Challenge - online giving opportunity					X							
Attend Campaign Coordinator Workshop							X	X				
Attend Campaign Kickoff Events								X	X			
SHARE SPECIAL EVENT OPPORTUNITIES												
Sports events (dates vary)			X				X				X	
Volunparties	X	X	X	X	X	X	X	X	X	X	X	X
Public Policy Summit (TBA)												
Create a team and run/walk the Airport 5k				X								
Create a team and run/walk the Tampa Bay Corporate 5k				X								
Attend GradNation			X									
Serve on a board or committee (talk to your RM)												

From <https://www.unitedway.org/campaigns/2018>

United Way South Sarasota County

BECAUSE OF YOU
THERE IS A WAY



South Sarasota County

PLEDGE NOW

MAKING MOMENTS

MY PROFILE

STAY CONNECTED

LOG OUT



THIS IS YOUR MOMENT
MAKE A PLEDGE. MAKE A DIFFERENCE.

Welcome

to the Pledge Demo

Camp

to help you learn more about the

to your community's challenges and

to help you learn more about the

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CAMPAIGN TECH

SAVE TIME AND SIMPLIFY YOUR CAMPAIGN.

Coordinator Benefits

**No additional fees to use our campaign software*

➤ Speak with our Development Director on which software support may be right for you!

➤ **AUCTION & RAFFLE
SOFTWARE**

➤ **PEER to PEER Fundraising
Tools**

➤ **5K and VIRTUAL 5K Runs**

**Reach out to your relationship manager for
questions!**

Erin Lilly, Public Relations & Resource
Development Director: 941.525.4128
development@uwssc.com



RECOGNIZING EXCELLENCE: CAMPAIGN COORDINATOR SUPPORT

Keep your team focused on excellence by sharing the variety of support measures for our coordinators!

We take pride in supporting the coordinators and have numerous resources to assist you! Introducing one of our powerful enthusiasm generating tools, Gallagher, the official United Way South Sarasota County mascot, named after United Way Worldwide CEO, Brian Gallagher.

Contact your relationship manager, Erin Lilly at 941.525.4128 development@uwssc.com to have us put her on your campaign calendar to inspire giving!



SMALL CHANGE, BIG DIFFERENCE.

LIVE UNITED

UNITED WE FIGHT.
UNITED WE WIN.

United Way fights
for the education and
financial stability of
every person in our
community.

Your weekly contribution
will add up to big wins
for your local community.

LIVE UNITED®.

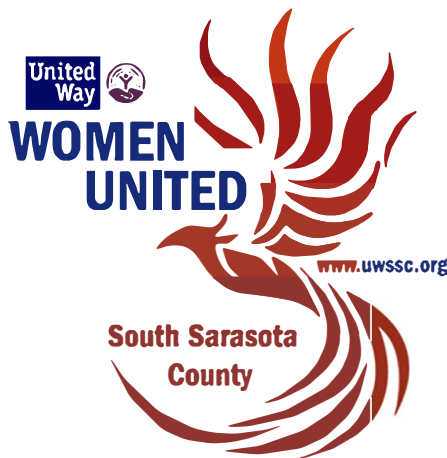
Homeless Outreach Team Caseworker



Impact Initiative Partners

*"Campaigns like these also
help fund programs for
Health, Education and
Financial Stability through 23
non-profits and 28 Human
Services Programs throughout
South Sarasota County."*

Where do I make an impact with my contribution in South Sarasota County?



LOCAL COVID-19 relief fund

100% of donation goes directly to families and individuals in:
Venice, Englewood, North Port, Laurel, Nokomis and Osprey

Targeted Community Giving.

**LIVE UNITED.
GIVE UNITED.**

"Uniting the Caring Power of our Neighborhood of
Individuals, Businesses, and Non-Profits."

Over \$40,000 at work in our community.

Assistance
Referral Resource



United Way South Sarasota County
is looking for FREE Tax Preparation
Volunteers

UWSSC.ORG



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