

**THE  
BOLD  
WAY**

**United Way**  
OF GREATER CHARLOTTE



**2025 Workplace Campaign Volunteer Training**  
August 26, 2025

# WELCOME



**LEANNE SKIPPER**

**Vice President, Interim Chief  
Development Officer**

*United Way of Greater  
Charlotte*

**United Way**  
OF GREATER CHARLOTTE

# ABOUT DO GREATER & CRTVLab



**WILLIAM MCNEELY**

**Founder & CEO**

*Do Greater Inc. | Do Greater  
Creative Labs*



# At Today's Training

- Our Mission, Our Work
- The Impact of Your Support
- Elements of a Successful Campaign
- Campaign Planning Checklist & Campaign Toolkit
- Campaign Success Story
- Engagement Opportunities at United Way
- Q&A

# OUR MISSION OUR WORK



**KATHRYN FIRMIN-SELLERS**

**President & CEO**

*United Way of Greater  
Charlotte*

# THE IMPACT OF YOUR SUPPORT



**SUSANA GONZALEZ**

Senior Manager, Neighborhood Relationships

*United Way of Greater Charlotte*



**VENITRA WHITE-DEAN, CDP**

Executive Director

*The Frankie Mae Foundation*



**MASHONNA HUGHES**

Chief Dignity Officer

*Project Outpour*



**JULIANA LOZANO, MSW, LCSWA**

Founder & Executive Director

*Despierta*

# CAMPAIGN PLANNING CHECKLIST & TOOLKIT



**KIM SAVAGE DINKLER**

**Associate Director, Workplace  
Giving**

*United Way of Greater  
Charlotte*

# GETTING YOUR CAMPAIGN STARTED

United Way  
OF GREATER CHARLOTTE



## IT'S CAMPAIGN SEASON!

Getting Your Campaign Started

### PLANNING CHECKLIST:

- Connect with your United Way Campaign Manager
- Choose campaign dates
- Review the campaign toolkit
- Promote your campaign & giving platform
- Plan & host a campaign kickoff
- Provide employees with engagement opportunities



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# MEET YOUR CAMPAIGN MANAGER



**ALAN BRIDGES**

Manager, Resource  
Development

*United Way of Greater  
Charlotte*



**DAVID DULIN**

Senior Manager, Workplace  
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**KEANNA MARSH**

Senior Manager, Community  
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# Elements of a Successful Campaign

## Education, Engagement, & Fun!

- Campaign committee organization
- Communication plan
- Senior Leadership involvement/giving
- Engaging and fun activities
- Corporate volunteer opportunities
- Year-round engagement with United Way

# Campaign Toolkit

## Your one stop shop for campaign content!

- One Pagers- County and program specific
- United Way Partner Agency List
- Informational Videos
- Partner Agency and United Way Impact Stories
- Making Choices Virtual Activity
- 2025 Workplace Campaign Volunteer Training Resources



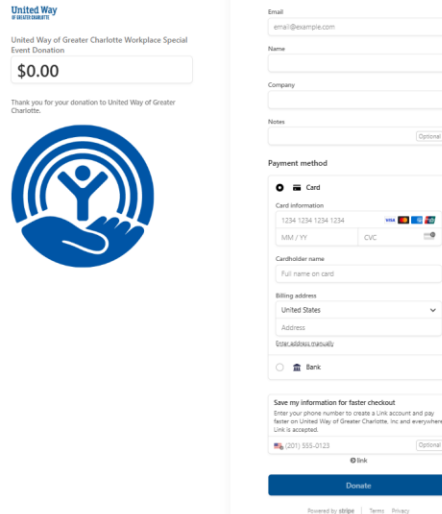
# New Campaign Tools

## Quarterly Updates

Starting in Q1 (January 2026) we will be sending out Quarterly United Way Update Messages to Workplace Campaign Volunteers for distribution to employees.

## Workplace Special Events

We are now using Stripe as a tool for collecting funds for Workplace Special Events.



The image shows two side-by-side screenshots. The left screenshot is a United Way donation form for a 'Workplace Special Event Donation'. It features the United Way logo, a text input field for the amount with '\$0.00' entered, and a 'Donate' button. The right screenshot is a Stripe payment interface. It includes fields for 'Email', 'Name', 'Company', and 'Notes'. Under 'Payment method', the 'Card' option is selected. It shows 'Card information' with a masked card number, expiration date, and CVC. Below that are fields for 'Cardholder name', 'Billing address', and 'Address'. There is also a 'Bank' option. At the bottom, there is a 'Donate' button and a footer with 'Powered by Stripe | Terms | Privacy'.

# CAMPAIGN SUCCESS STORY



**SARAH SCHLAGGETTER**  
Senior Manager, Marketing  
*GreerWalker*



**GreerWalker**  
CPAs & Advisors

# **UW 2025 Workplace Campaign Volunteer Training – GreerWalker Campaign Example**

# Picking a theme, organizing events, setting the schedule



**GreerWalker**  
CPAs & Advisors

- Step 1: Identify committee members
  - We make sure that there are individuals from all or most departments as well as from both of our offices
- Step 2: Meet for brainstorming meeting there we pick:
  - Theme (this changes every year)
  - Dates of campaign – this year we ran our campaign across two weeks (Thurs – Thurs) and saw a lot of benefit
  - Activities/ schedule – break into pairs based on activities so that everyone in the committee shares the work



## The GreerWalker Olympics

*2024 United Way Campaign  
Schedule of Events*

**Thursday, November 14th, 10 a.m. - Opening Ceremonies**  
Campaign Kick-off meeting w/ United Way representative

**Friday, November 15th & Monday, November 16th - Individual Events**

Complete Poverty Simulation  
Extra points for early online donations!  
Virtual 5K entries due by Thursday, November 18th

**Tuesday, November 16th, 1 p.m. - Team Trials**  
Team Trivia via Zoom

**Wednesday, November 17th - "Give"athon**  
Donation Day

**Thursday, November 18th, 4 p.m. - All Around Finals & Closing Ceremonies**  
Scavenger Hunt and Happy Hour



## Breaking into teams

- We started with the employee detail and distributed individuals based on level, department, and office so that they were as even as possible
  - We also were able to check PTO calendars to determine if anyone was on leave or PTO for the duration of the campaign so that we could distribute those individuals
- We made sure there were team leaders and partners assigned to each team that could help motivate team members to participate (sometimes with prizes!)
- The first day of the campaign, teams were announced, and teams came up with their own team name that went along with the theme for the year
- Team leaders also created group chats in zoom for each group so they could communicate and motivate throughout the week

# Tracking points

- This year we created a comprehensive master tracking spreadsheet that tracked donations, event participation, and team points
- We sent daily updates to the firm with team points and participation percentages so that everyone could see their standing day-to-day.



Good Morning!

Here are the current team standings for our United Way Campaign. These have all Tier 1 donations, all poverty simulations, team trivia scores, and any 5Ks that have been submitted thus far:

Team Name	Total Points	Total Donations	Poverty Sim	Virtual 5k	Trivia Participation	Trivia Results
Give for the Gold	151	80	27	11	23	10
Raygun Kangaroos	148	78	25	5	20	20
GL N' Juice	136	68	22	4	22	20
The Gold Standard	134	74	23	9	18	10
Ledger Leapers	112	60	23	6	18	5

Shoutout to both Give for the Gold and the Raygun Kangaroos, both of your teams have hit 100% participation for donations!!

There is still time to earn points for your team



# Goals, prizes, and loser consequences

- Goals
  - 85% participation with an average non-partner donation of \$300
- Firm Prizes
  - If the firm reached the goal, everyone received an extra half-day summer Friday
  - The winning team (team with the most points across all competitions as well as participation points) won an extra day of PTO
  - No consequences for “losing” team
- Team Prizes
  - Team's also ran their own contests throughout the week that encouraged participation. Prizes in these contests included concert/ sports tickets, gift cards, etc



# Do you have any questions?

Feel free to reach out!



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**GreerWalker**  
CPAs & Advisors

# ENGAGEMENT OPPORTUNITIS AT UNITED WAY



**DAZIA MILLER**

**Manager, Engagement**

*United Way of Greater  
Charlotte*

# Engagement Opportunities – The Longest Table



## The Longest Table

The Longest Table is a free brunch for the community centered around bringing neighbors from all backgrounds together at one long table to share a meal, conversation, and ideas, with a goal of creating deeper connection.



# Engagement Opportunities – Volunteering

## Live United Days

### Live United Day - North Mecklenburg

- Wednesday, Sept. 17th
- 10am-12:30pm

### Live United Day – Central/Albemarle

- Saturday, October 18th
- 3pm-7pm

### Live United Day – Grier Heights

- Saturday, December 13th
- 1pm-3pm

<https://unitedwaygreaterclt.org/live-united-days/>



# Engagement Opportunities – Volunteering

## MLK Call to Service – January 2026

*Honoring Dr. Martin Luther King's legacy and spirit of service through action*

Volunteers assemble snack packs for students attending tutoring and afterschool programs supported by United Way.



# Engagement Opportunities – Kit-Packing

## Types of Kits

- Pencil Pouch Kits
- Hygiene Kits
- Art Kits
- Stem Kits



## Other

- Snack Packs
- Backpacks (School Supplies)



# Engagement Opportunities – One-Offs

## One-Off Requests

Email Dazia at [dmiller@unitedwaygreaterclt.org](mailto:dmiller@unitedwaygreaterclt.org).



**We want your input!**



**WE'RE IN THIS  
TOGETHER**

**United Way**  
OF GREATER CHARLOTTE



**United Way of Greater Charlotte**

4,896 followers

22h • 🌐



Last week, our staff kicked off our internal campaign with a fun spirit week! We had decade day, band/artist t-shirt day, United Way day (seen below), twin day & a bake sale. 🍪👩🍳

We had a blast, but more importantly... we had 100% participation in our campaign!



We can't wait to see what activities you & your companies do for YOUR workplace campaigns this season. Tag us in your celebration posts!



You and 17 others

1 repost



Love



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**QUESTIONS?**

# THANK YOU!

## GET INVOLVED

[unitedwaygreaterclt.org](https://unitedwaygreaterclt.org)

704.372.7170

## CONNECT

 [@unitedwaygreaterclt](https://www.facebook.com/unitedwaygreaterclt)

 [unitedwaygreaterclt](https://www.instagram.com/unitedwaygreaterclt)

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