TOGETHER WE’RE GREATER THAN ANY CHALLENGE.

LIVE UNITED
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 Suncoast 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 Suncoast Board of Directors and Staff

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A SINGLE MISSION: BREAKING THE CYCLE OF GENERATIONAL POVERTY

In 2014, United Way Suncoast adopted a 5-year strategic plan to break the cycle of generational poverty through educational strategies that give children the skills to succeed and help adults achieve financial stability.

Why? Because under-educated children in poverty are nearly three times more likely to drop out of school and repeat the cycle of poverty than their middle income peers.

The good news is that we know how the cycle works, we know how to break it, and we have the community relationships to partner with business, government and nonprofit leaders to make change happen. As part of this plan, United Way Suncoast and partners worked together to establish three community-wide targets to measure progress and impact.

**GOALS:** Ensure that children are surpassing key readiness and early grade reading benchmarks

**2020 COMMUNITY TARGET**
Improve regional 3rd grade reading scores to 65%

**2017 COMMUNITY STATUS**
3rd grade reading scores 56.4%

**GOALS:** Ensure that children are graduating from high school with the skills necessary to pursue post-secondary education or vocational training

**2020 COMMUNITY TARGET**
Improve high school graduation rates to 90%

**2017 COMMUNITY STATUS**
High school graduation rates 82.8%

**GOALS:** Ensure adults achieve long-term financial stability by developing the skills and opportunities to obtain and sustain employment

**2020 COMMUNITY TARGET**
Increase the regional number of individuals/families living at 200% of poverty or better to 65%

**2017 COMMUNITY STATUS**
Number of individuals/families living at 200% of poverty or better at 67.6%

**OTHER SERVICES WE PROVIDE**
Support Services
Neighborhood Resource centers
MISSION UNITED™
Volunteer Activation
United Way Suncoast fights for the education and financial stability of every person in the communities we serve. Here are a few examples of the impact you make possible through your gift to United Way.

**138,417 Local Children**
Local children received support from United Way to improve their educational opportunities in DeSoto, Hillsborough, Manatee, Pinellas, and Sarasota counties.

**86% Children**
86% of 2,892 children did not suffer summer learning loss due to access to educational programming over the summer.

**100% High School Students**
100% of dual enrollment students in Operation Graduate, a program for at-risk high school students, graduated on time and 90% were accepted into higher education or military service.

**84% Parents**
84% parents reported an increase in knowledge on how to better support their children's academic career after attending a Parent University event.

**14,192 Adults**
14,192 adults were provided pre-employment services and financial education support to help move forward on the path to financial stability.

**85% Adults**
Of adults who took a certification or licensing program received or made strong growth toward this license, increasing the financial stability of their household.

**19,921 Tax Returns**
19,921 tax returns were prepared by United Way’s VITA partnership, with United Way-specific sites preparing 11,069 returns. Using over 300 trained volunteers, taxpayers saved over $25 million in both savings from tax preparation fees and refunds that were given back to the community which helped pay debt, secure safe housing, and more.

**49,665* Volunteer Hours**
49,665* volunteer hours organized through United Way HandsOn Suncoast delivered $1,198,913 in value back to the community.

*2017 volunteer hours
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.

<table>
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<tr>
<th>FIVE STEPS TO SET YOUR GOAL</th>
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### THE CAMPAIGN PLANNING MATRIX

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<tr>
<th>Task</th>
<th>Date Completed</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Meet with your Relationship Manager for a planning meeting.</td>
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<tr>
<td>Obtain CEO endorsement and support.</td>
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<td>Appoint Workplace Campaign Coordinator and recruit campaign committee.</td>
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<td>Appoint Leadership Giving Chair and recruit leadership committee.</td>
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<td>Secure a corporate gift or corporate match commitment.</td>
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<td>Determine electronic and/or paper pledge tool and personalize pledge forms.</td>
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<td>Request CEO/management appear at kickoffs, rallies and presentations.</td>
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<td>Develop detailed timeline.</td>
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<td>Develop campaign plan: Set goal</td>
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<td>Determine marketing strategy</td>
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<td>Choose campaign methods</td>
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<td>Set incentives</td>
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<td>Establish/continue leadership giving program</td>
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<td>Arrange agency speakers and tours</td>
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<tr>
<td>Plan special events <em>(See Little Book of Event Ideas)</em></td>
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<tr>
<td>Plan company leadership meetings and kickoff event.</td>
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<tr>
<td>Send e-mail communications to notify staff of campaign activities.</td>
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<td>Send letter from top executives to all employees encouraging participation.</td>
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<tr>
<td>Calculate results to include total dollars, number of donors, number of employees, and leadership givers.</td>
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<td>Report final results to your Relationship Manager during an audit.</td>
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<td>Thank campaign committee and employees with events and letters.</td>
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<td>Be sure to report results.</td>
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<tr>
<td>Year round employee engagement planning. <em>(See calendar on pages 13-15)</em></td>
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<tr>
<td>Share thank you letters and ongoing updates from United Way Suncoast with employees.</td>
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</table>
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 Suncoast 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.
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 Suncoast 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).
CREATE ORGANIZATIONAL IMPACT YEAR-ROUND

Engage your team
United Way Suncoast can be part of your corporate social responsibility plan. We offer your team a variety of engagement and professional development programs:

- Day of Caring Volunteer Activity (OCT)
- Workplace Lunch N’ Learn
- United Way Suncoast 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 Suncoast)
- Conduct final audit with RM
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.

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<thead>
<tr>
<th>ENGAGEMENT OPPORTUNITY</th>
<th>JAN</th>
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<td>Share volunteer opportunities with coworkers</td>
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<td>HandsOn Suncoast, VITA (income tax assistance), ReadingPals, FAFSA, Leadership Executive (LE) Program Recruitment, Financial Coaching (Volunteer Recruit and Community Awareness)</td>
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<td>Hold a HandsOn orientation at your workplace</td>
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<td>Agency tours</td>
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<td>Affinity Groups (Attend a Women United or Young Leaders’ Society event)</td>
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<td>Host a donation drive - school supplies, literacy kits and more</td>
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<td>Hold a literacy (or other) Lunch N’ Learn event</td>
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<td>Connect with us on Facebook, Twitter and Instagram</td>
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<td>Watch your inbox for your monthly e-newsletter</td>
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<td>Subscribe to general e-newsletter</td>
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<td>Share video stories provided by United Way Suncoast (quarterly)</td>
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<td>Day of Caring - a volunteer day for companies</td>
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<td>Night of Caring</td>
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<td>HandsOn Day of Service</td>
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<td>Day of Action (A United Way Worldwide event to spruce up local communities; we can help you design a company-specific project)</td>
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<td>Share special contests and promotions (dates vary)</td>
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<td>Give Day Tampa Bay - online giving opportunity</td>
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<td>The Giving Challenge - online giving opportunity (Sarasota and Manatee)</td>
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<td>Attend Campaign Coordinator Workshop</td>
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<td>Attend Campaign Kickoff Events</td>
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### SHARE SPECIAL EVENT OPPORTUNITIES

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<tr>
<th>SHARE SPECIAL EVENT OPPORTUNITIES</th>
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<td>Night with the Rays, Lightning, Bucs, etc. (dates vary)</td>
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<td>Volunparties</td>
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<td>Public Policy Summit (TBA)</td>
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<td>Create a team and run/walk the Airport 5k</td>
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<td>Create a team and run/walk the Tampa Bay Corporate 5k</td>
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<td>Attend GradNation</td>
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<td>Serve on a board or committee (talk to your RM)</td>
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E-PLEDGE: ELECTRONIC CAMPAIGN MANAGEMENT

SAVE TIME AND SIMPLIFY YOUR CAMPAIGN.

Company benefits
- Simplify campaign reporting and electronic communication
- Access to customizable employee email templates
- Real time access to your campaign stats
- Accessible from any computer or mobile device connected to the Internet
- Enable immediate employee appreciation and recognition
- Ideal for single or multi-campus locations
- Optional white labeled portal with co-branded messaging*

How it works
- United Way Suncoast staff create a private account for each employee (data upload).
- Company emails employee an invitation to participate in the campaign with a link to the account.
- Employee logs in and selects their level of investment.
- Employee receives immediate confirmation of their selection (for electronic pledges) and the opportunity to select how they would like to receive additional information about their investment (and tax information)
- Your Internal Campaign staff have real time access to campaign details for reporting and employee communication. (Paper pledge data can be entered by designated Campaign staff for simplified reporting.)

Cost
- No out of pocket expense. Nominal processing fee directly to United Way Suncoast, which further supports community impact work.

*Additional fees may apply for white labeled portal and customized content.
RECOGNIZING EXCELLENCE: CAMPAIGN AWARDS AND INCENTIVES

Keep your team focused on excellence by sharing the variety of honors and awards presented to companies and organizations. The awards provide an incentive to “go the extra mile,” recognize success, and showcase the incredible support of our community.

Campaign Coordinator Hall of Fame

United Way Suncoast’s Campaign Coordinator Hall of Fame Award recognizes an individual that leads a successful annual employee campaign incorporating “Best Practices” to increase overall participation and dollars raised and demonstrates support of United Way Suncoast’s mission.

Spirit of Suncoast Award

United Way’s Spirit of Suncoast Award honors local companies for their exceptional commitment and investment by their organization and their employees. The award is presented to four companies according to employee size—less than 100 employees; 101 to 499 employees; 500 to 999 employees; and more than 1,000 employees.

Workplace Excellence Award

United Way Suncoast’s Workplace Excellence Award recognizes significant increases and continuing excellence within our contributing organizations. Awards are based on percentage of employee participation, average employee gift, per capita employee gift, and percentage of employee increase.
LEADERSHIP DONORS

Leadership Donors are committed to leading change in our community. They support the impactful work of United Way Suncoast with annual gifts totaling $1,000 and up. You can become a Leadership Donor for only $19.23 per week. Over 2,000 Leadership Donors support United Way Suncoast each year and are celebrated with special event invitations and recognition within the community.

• Engage your current Leadership Donors before the general campaign. This strategy helps build momentum and sets the pace for a successful campaign.
• Ask your CEO to send an email or host a breakfast/luncheon to acknowledge all leadership donors.
• Hand-deliver personalized leadership pledge forms.
• Supply your United Way staff contact with the proper spelling of names, job titles, email addresses and correct investment amounts for each of your leadership donors. This will ensure proper recognition for their generosity.
• From your Leadership Donor team, match up peers to make the ask. Current leadership donors are the best ambassadors.
• Follow up with prospects until each pledge card is received.
• Develop and publicize the organization’s leadership investment goal as part of the overall campaign goal.
• Encourage peer participation.

<table>
<thead>
<tr>
<th>LEADERSHIP GIVING LEVELS</th>
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<tbody>
<tr>
<td>Tocqueville Society</td>
<td>$10,000 +</td>
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<tr>
<td>Admiral Society</td>
<td>$5,000 to $9,999</td>
</tr>
<tr>
<td>Leadership Donors, Women United and Keel Club</td>
<td>$1,000 to $4,999</td>
</tr>
<tr>
<td>Young Leaders’ Society and Anchor Club</td>
<td>$500 to $999</td>
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LEADERSHIP OPPORTUNITIES

**Loaned Executive Program**
Intensive 13-week immersive leadership development for high-potential staff. Loaned employee works directly with United Way to gain experience in project management, communication, public speaking, professional networking and relationship building, and corporate social responsibility impact.

**Internal Campaign Chair and Committee**
Challenge high-potential employees to show their business acumen by planning and executing the organizational campaign. United Way staff provides mentorship during the campaign and shares insight on the team’s performance. Participants build experience in planning and implementing a marketing campaign, organizing resources, budgeting, leading others, communication and public speaking.

**Young Leaders’ Society***
Young Leaders’ Society is for emerging professionals 40 years old and under who are passionate about community involvement. Members bring more than youth and professional stature: they are leaders with a vision for their future and our community.

**Women United***
Women’s Leadership Council brings together women of all ages in the spirit of philanthropy and service. As a network of women in leadership positions, they use their energy, talent, and passion to build a strong collective voice in United Way Suncoast impact areas, especially in the arena of early literacy.

**Volunteer Opportunities**
Promote team building, build communication, and break through silos with organized volunteer events for workgroups, departments or organization-wide. Challenge high-potential staff to organize your next volunteer event through United Way HandsOn Suncoast.

**Alexis de Tocqueville Society**
Tocqueville Society members are community champions who contribute $10,000 to $10,000,000 annually to United Way. Members network with area business leaders and philanthropists by attending exclusive year-round events.

*Women United donors make a gift of $1,000 or more annually.
Young Leaders’ Society make a gift of $500 annually.*
MOST GENEROUS WORKPLACES
SUNCOAST REGION

TOP10 MOST GENEROUS WORKPLACES
SUNCOAST REGION

PUBLIX SUPER MARKETS CHARITIES
RAYMOND JAMES®
DUKE ENERGY®
USAA®
Mosaic
Enterprise
WELLS FARGO
TechData
macy's
CITI
### Suncoast Region TOP 100 MOST GENEROUS WORKPLACES

1. Publix Super Markets
2. Raymond James
3. Duke Energy
4. USAA
5. The Mosaic Company
6. Enterprise Leasing Corporation, LLC
7. Wells Fargo
8. Tech Data Corporation
9. Macy’s
10. Citi
11. City of Tampa
12. United Parcel Service
13. Ferman Motor Car Company, Inc.
14. Hillsborough County
15. Florida Blue
16. EY, LLP
17. Deloitte
18. Regions Bank
19. SunTrust Bank
20. Target Stores
21. Hillsborough County Aviation Authority
22. PAR, Inc.
23. Bank of America
24. BayCare Health System
25. Tampa Bay Rays
26. Transamerica
27. FCCI Insurance Group
28. Moffitt Cancer Center
29. Fifth Third Bank
30. Carlton Fields
31. TCS
32. The Bank of Tampa
33. School Board of Sarasota County
34. TECO Energy
35. City of Clearwater
36. City of St. Petersburg
37. MetLife
38. PwC
39. Valpak
40. United Way Suncoast
41. T. Rowe Price, Inc.
42. Ceridian
43. Hill Ward Henderson
44. Gerdau
45. Zachry Group
46. Tampa Bay Times
47. Sarasota Memorial Health Care System
48. PNC Bank
49. AAA – The Auto Club Group
50. Holland & Knight LLP
51. Quala
52. FedEx
53. AT&T Global Network Services
54. Hillsborough County Public Schools
55. Tampa Bay Trane
56. TD Bank
57. Costco
58. Signature Flight Support
59. Travelers
60. General Electric (GE)
61. Johnson & Johnson
62. Lockheed Martin RMS
63. CAE USA Inc.
64. Intel Corporation
65. Cushman & Wakefield of Florida
66. Team Fishel
67. Northern Trust – Sarasota
68. Nationwide Insurance/ Claims
69. Stadium Toyota
70. PNC Foundation
71. Electric Supply, Inc.
72. Trenam Law
73. ConMed
74. Humana
75. Florida Power & Light Company
76. USAmieriBank
77. Hercules Sealing Products
78. Sarasota Board of County Commissioners
79. City of Plant City
80. Suncoast Credit Union
81. KPMG LLP
82. Brown & Brown
83. Raytheon
84. Universal Insurance Holding of N.A.
85. Walmart
86. IBM Global Services
87. Principal Financial
88. IBERIABANK
89. Delta Air Lines, Inc.
90. BB&T
91. Herald-Tribune Media Group
92. Charter Spectrum Services
93. HeartMedia, Inc.
94. Eli Lilly Company
95. City of Sarasota
96. Dillard’s
97. Spectra Energy Corp.
98. PCL Civil Constructors, Inc.
99. Pinellas County Schools
100. 100 First Housing

### MOST GENEROUS WORKPLACES

Each of these workplaces strive to create a culture of caring that includes supporting a company-wide annual workplace campaign enabling employees to donate through simple payroll deductions.

These workplace campaigns require an investment of time and resources by the leadership of these organizations to plan and organize information sessions and special-themed events—all done in the spirit of working together to make a difference.

In addition to financial investments, many of these workplaces encourage staff to volunteer on a regular basis.
HOW MUCH CAN YOUR GIFT REALLY DO?

$2 PER CHECK
Provides **3 hours of academic instruction to students** from a qualified reading mentor.

$10 PER CHECK
Provides **20 students with summer bridge books** to help reduce summer slide.

$15 PER CHECK
Provides **summer tutoring to help a low income student attending a summer transition camp** be successful when entering middle school in the fall.

$26 PER CHECK
Provides **wraparound services for families in financial need**.

$40 PER CHECK
Provides the **financial match to encourage low-income families to save for college, home ownership, starting a small business, and emergencies**.

$56 PER CHECK
Provides **two low-income students with a scholarship to a summer camp that includes a literacy focus** to prevent the summer academic slide.

$100 PER CHECK
Provides comprehensive **services for academically struggling students to ensure that they graduate** on time.

*Based on annual gift spread over 26 pay periods*