



United Way of Greenville County

## *Palmetto Society Workplace Effort*

### How To – Best Practices

#### WHAT ARE THE STEPS FOR ORGANIZING A PALMETTO SOCIETY EFFORT?

- **Appoint a Palmetto Society Chairman** – someone who is already a Palmetto Society member to lead the effort.
- **Enlist the help of current Palmetto Society members to serve on a Palmetto Society committee**, to brainstorm ideas for promoting Palmetto Society and to serve as Palmetto Society solicitors.
- **Develop a prospect list.** Prospects would include employees at a certain salary level (\$50,000+), management team, supervisor/director level, employees currently giving \$750+. This should be individualized to your workplace, whatever grouping or levels that are appropriate in your work environment.
- **Develop a solicitation plan** that may include a group meeting (lunch/dinner hosted by CEO) and/or one-on-one follow-up. This plan should include solicitation of new members and renewal/thank you of current members.
- **Determine how to utilize the Palmetto Society initiatives in your workplace.** Young Philanthropists – age 40 and under, YP 20's – age 20 and under, Women's Leadership and African American Leadership. Consider holding special functions targeted at these groups.
- **Coordinate Meeting/Event.** Work with United Way staff to arrange Palmetto Society volunteer leadership and/or agency speaker to attend meeting and to prepare personalized materials for all prospects and members. Consider holding your function at a funded agency to see first hand how their dollars are at work – United Way staff can arrange that for you.
- **Develop a plan for follow up.** One-on-one with all attendees to meeting and with those who did not attend.
- **Gather and Report Results.** Create a method of gathering Palmetto Society pledge cards and use Palmetto Society Report Form and procedures to convey all information to United Way. Don't forget to review list of renewing Palmetto Society members for accuracy.
- **Thank all Palmetto Society donors.** Recognizing Palmetto Society level gifts is an important element of the Effort. Be sure to thank your Palmetto Society givers with a letter/card from the Palmetto Society Coordinator or CEO.

#### Tools for a Palmetto Society Effort

- Personalized Palmetto Society pledge cards for members and prospects.
- Palmetto Society Brochures.
- Young Philanthropists, YP 20's, Women's Leadership and African American Leadership brochures.
- Sample letters for invitation to events, solicitation and thank you.
- Palmetto Society leadership speakers, including specialized speakers from Young Philanthropists, Women's Leadership and African American Leadership.
- Tours of funded agencies and meeting locations at agencies for special Palmetto Society meetings.
- Campaign video.
- Palmetto Society PowerPoint.
- Help from a mentor. Ask United Way staff for names of contacts at other companies that have run creative and successful Palmetto Society Efforts.
- United Way staff, Loaned Executive support through all steps of the process. Call 467-3551 for all questions, Palmetto Society materials, speakers or tours.