



**WORKPLACE**

**CAMPAIGN**

**GUIDE**





# STEPS TO A SUCCESSFUL CAMPAIGN

## PREPARE

- **Work with your United Way Relationship Manager to plan this year's campaign.** What worked pre-pandemic and during the pandemic? What hasn't worked? What needs to be adjusted this year considering the changing work landscape? How can you capitalize on both virtual and in-person engagement?
- **Set campaign dates.** Allow plenty of time to create strategic messaging and to get your online donation portal set up.
- **Assemble a campaign team** to help distribute campaign messaging across each department or team. This is especially important if your organization engages in a hybrid/flexible work model.
- **Get leadership buy-in.** Campaigns are more successful when driven from the top-down.
- **Set a campaign goal** that your campaign team and employees can rally behind.
- Set key points for distributing **company-wide messaging**, i.e., announcement of the campaign, launch day, mid-campaign, final push, and thank you.

## EXECUTE

- **Use your planned messaging** to launch the campaign. Consider using video messages from leadership to encourage donating.
- **Run team challenges and offer incentives** to encourage participation. Example: The team with the highest participation wins an outdoor lunch with the CEO or other company leaders or an extra day of PTO.
- Utilize campaign team members to keep the campaign top of mind on **team conference calls, in-person meetings, or personal asks via one-on-one meetings or emails.** Conduct regular meetings with the team leads to discuss strategies and needs for their team.

## WRAP UP

- **Finalize campaign results** with your online giving platform and submit to your payroll department.
- Consider doing an **in-person wrap-up and send a thank you note** to the entire company, group of donors, and your campaign team.
- **Celebrate your results!**





# MAKE IT S.O.C.I.A.L.

## **S** SHORT & SWEET

Digital campaigns are best when kept to two weeks or less. The longer the time, the less momentum.

## **O** OVERALL GOALS

Clearly state your goals – dollars raised, number of participants, average donation, volunteer hours.

## **C** COMMUNICATE

A picture is worth a thousand words! Use photos or videos when possible in your communication and storytelling. This helps connect people to the mission. Weave in in-person asks in addition to digital content.

## **I** IMPACT

The economic and social implications of the COVID-19 pandemic are long-winded, and your dollars can help rebuild the community. Tell this story in your communications. Your United Way Relationship Manager can help provide this content and narrative.

## **A** ACCELERATE SUCCESS WITH GAMES

Daily prizes, trivia, raffles, etc., are a great way to keep people connected. Consider having individual prizes for those who reach their personal goal and for teams who reach their goals.

## **L** LIVE UPDATES ON GOAL PROGRESSION

Celebrate your wins! Keep the momentum going by celebrating daily wins and keeping the campaign's progress at the top of all communication.



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# BEST PRACTICES

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## KICK-OFF:

- **Consider a kick-off celebration;** this year's campaign is a great opportunity to bring employees together for a good cause. Kick-offs can start with company leadership and include United Way speakers.
- **Record a video** from a senior executive to be distributed electronically to all employees.
- **Highlight leadership buy-in or leadership match commitment.** Campaigns are more successful with communicated buy-in from the top.

## UTILIZE AVAILABLE RESOURCES:

- The **Workplace Campaign toolkit** is available online at [UnitedWayGCR.org/Campaign-Center](https://UnitedWayGCR.org/Campaign-Center) and can be provided by your Relationship Manager. This toolkit includes sample email messaging, video links, PDFs of collateral materials, and more.
- Also available to you are **traditional paper pledge forms, e-pledging portals, and fillable pledge PDFs.** There is even language and processes available to implement a **rollover campaign.**
- Your United Way Relationship Manager can guide you through all steps of your campaign.

## COMMUNICATIONS:

- **Consolidate and coordinate outgoing communications** to avoid overwhelming employees.
- Promote any **corporate match, corporate gifts, or other incentives** to increase contributions.
- Have your Campaign Committee make **individual asks of their team.** If possible, this is always done best face-to-face. Consider phone calls instead of emails as well. *People give to people.*

## INCENTIVES:

- Popular prizes include **PTO, rewards, or raffles for unique experiences.**
- Incentive for **new and existing donors.**
- **Consider using their completed pledge forms** as entrance into the raffle, rather than an additional cost for a ticket.

## EVENTS:

- **Traditional campaign events may look different – but we can still make them engaging.**
- Encourage employees to participate in virtual or in-person **volunteer opportunities** on their own or as a company. Available opportunities can be found at [UnitedToVolunteer.org](https://UnitedToVolunteer.org).
- **Find opportunities to create virtual or in-person events:** host a Zoom kick-off for employees to hear from company and campaign leadership, host a United Way virtual ALICE simulation, have a virtual silent auction with prizes like gift cards or lunch with the CEO, have a virtual day of impact, or a video call with United Way and other local nonprofit agencies.
- **Consider having an event once the campaign is launched** to promote donations and have a little fun. Popular events include dress-down days, company lunches, silent auctions/raffles. Your United Way Relationship Manager can provide you with messaging and talking points for your events.

## DONOR NETWORKS:

- When asking for donations, remember that United Way Donor Networks are a way for employees to extend their impact and deepen their engagement with our work. Based on their giving level, employees can join the following networks and **taking part in meaningful, year-round events, volunteer opportunities, and engagement.**
  - » **Tocqueville Society** (\$10,000+)
  - » **Leadership Society** (\$1,000+)
  - » **Women United** (Women \$500+)
  - » **Emerging Leaders UNITED**

## RECOGNITION AND THANKS:

- Consider doing an **in-person wrap-up celebration** to celebrate the impact your employees have made.
- **Send a thank-you email** from your CEO, Campaign Chair, Co-Chair, Committee, or other team members.
- **Highlight givers** of a certain level, publicize results and reiterate the impact of gifts on a team call or monthly e-newsletter.
- **Work with your United Way Relationship Manager** to include updates all year on United Way's impact in company newsletters.

# FREQUENTLY ASKED QUESTIONS

## **Q: HOW CAN WE COLLECT DONATIONS ONLINE?**

**A:** United Way of the Greater Capital Region offers a free online giving platform to collect your employee donations. This platform offers various levels of customization depending on your company's size and needs and it can collect payroll deductions, credit cards, and other gifts. For more information or a demonstration of the site, contact your United Way Relationship Manager.

## **Q: ARE DONATIONS TO UNITED WAY TAX-DEDUCTIBLE?**

**A:** Yes, and The CARES Act now allows taxpayers who do not itemize to deduct up to \$300 per year in charitable contributions. For additional information, please visit reach out to your United Way Relationship Manager.

## **Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?**

**A:** Most campaigns take place from September to December, but they can happen at a time that is best suited for your organization.

## **Q: WHEN DOES PAYROLL DEDUCTION START?**

**A:** For most companies, payroll deduction usually runs from January 1 – December 31. However, United Way does not set your payroll schedule; it is a company decision.

## **Q: CAN EMPLOYEES DESIGNATE THEIR DONATION?**

**A:** As a service to donors, we make it possible to specify a non-profit organization to receive your donation. However, the direct investment of your dollars designated to United Way of the Greater Capital Region goes further to strengthen education, income, and health – the building blocks of opportunity – in our eight counties.

# THANK YOU!

Thank you in advance for your efforts! By agreeing to lead your company's workplace campaign, you join a passionate group of change-seekers and trailblazers creating lasting change in the Greater Capital Region.

You are a frontline volunteer who raises awareness about the vital role United Way of the Greater Capital Region plays in the community. Together with passionate supporters like you, we're leading the charge to improve education, income, and health – the building blocks of opportunity for everyone in our community.

We hope this guide will provide you with the necessary resources to run your campaign successfully. Please reach out to your United Way Relationship Manager, who can provide additional support and guidance throughout your campaign.



# WORK UNITED LIVE UNITED

**Fighting for the health, education and financial  
stability of every person in every community**



United Way  
of the Greater Capital Region

[UnitedWayGCR.org](http://UnitedWayGCR.org)