DIGITAL CAMPAIGN GUIDE
PREPARE

• Work with your United Way Relationship Manager to rethink this year’s campaign. What has worked in the past? What hasn’t worked in the past? What needs to be adjusted this year considering the Pandemic?

• 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 this year considering social distancing restrictions.

• 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 incentivize 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 the campaign team members to keep the campaign top of mind on team conference calls or personal ask emails. Conduct regular calls 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 HR.

• Consider sending a thank you note to the entire company, a group of donors and your campaign team.

• Celebrate your results!

STEPS TO A SUCCESSFUL CAMPAIGN

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

SHORT & SWEET

Digital campaigns are best when kept to 2 weeks or less. The longer the time, the less momentum.

OVERALL GOALS

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

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.

IMPACT

The worst economic and social implications of the COVID-19 Pandemic are yet to come, 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.

ACCELERATE SUCCESS W/ 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.

LIVE UPDATES ON GOAL PROGRESSION

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

**KICKOFF:**
- Record a video from a senior executive to be distributed electronically to all employees. United Way speakers are also available via video call to talk about the impact of gifts made to United Way of the Greater Capital Region.

**UTILIZE AVAILABLE RESOURCES:**
- The Workplace Campaign toolkit is available online at UnitedWayGCR.org/Campaign-Toolkit 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 all steps.

**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 will look different this year – but we can still make them engaging.
- Encourage employees to participate in virtual volunteer opportunities on their own, or as a company. Opportunities include writing encouraging notes to health care providers, teachers, or making videos of yourself reading books to be shared with local non-profit agencies supporting children. The full list of opportunities available can be found at UnitedToVolunteer.org.
- Find opportunities to create virtual events: host a Zoom kickoff for employees to hear from company and campaign leadership, host a United Way virtual poverty 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.
- If possible, consider having smaller in-person events once the campaign is launched to promote donation options and have a little fun.
- Popular events include dress down days, company purchased individually-wrapped lunches, silent auctions/raffles. Your United Way Relationship Manager can provide you with messaging and talking points for these events.

**GIVING SOCIETIES:**
- When asking for donations, remember that United Way Giving Societies 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 Giving Societies and take part in meaningful, year-round events, volunteer opportunities and engagement.
  - Tocqueville Society ($10,000+)
  - Leadership Society ($750+)
  - Women United (Women $250+)

**RECOGNITION AND THANKS:**
- Send thank you email from your CEO, Campaign Chair, Campaign Co-Chair, Campaign Committee, or other team members.
- Highlight givers of a certain level on a team call or monthly e-newsletter.
- Publicize results and reiterate the impact of gifts via company newsletter, email or intranet.
- Include updates on United Way’s impact in company newsletters.

**FREQUENTLY ASKED QUESTIONS**

**Q: HOW LONG SHOULD OUR VIRTUAL WORKPLACE CAMPAIGN RUN?**
**A:** The average campaign runs for one or two weeks. Longer campaigns often take up additional time and resources for both the campaign coordinator and employees. One to two weeks is sufficient to kick off your campaign, get the message out effectively, and make your ask without overburdening staff. An exception could be if you are the campaign coordinator at a very large or multi-site company.

**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 can collect payroll deduction, credit card, and e-checks 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. For additional information, please visit UnitedWayGCR.org.

**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 program 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 7 counties.

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**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 New York’s 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 virtually. 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