STEP TO A SUCCESSFUL CAMPAIGN

PREPARE
Meet with your United Way Relationship Manager to review past campaigns and opportunities to boost campaign success.

• 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. A good ratio is one campaign team member per every 25 employees.

• Set a campaign goal that your campaign team and employees can rally behind.

• Set key points for distributing company-wide messaging, such as 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 you and your organization’s leadership to encourage donating.

• Send messaging throughout the campaign on a company-wide level.

• Run team challenges to encourage participation. Example: The team or business unit with the highest participation wins lunch with the CEO or other company leaders.

• 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. Submit payroll deduction information to your HR or payroll processing department.

• Consider sending a thank-you note to the entire company and/or a group of donors.

• Thank 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 and/or 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.

**I. IMPACT**
Provide impact equations – what does my donation do at various levels?

- $3 per paycheck enables a student to participate in interactive STEM programs.
- $20 per paycheck gives one child or adult access to health care.
- $40 per paycheck provides an unemployed person the training necessary to find a job and succeed in a career.
- $100 per paycheck provides a young student the opportunity to attend a quality preschool.

**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 momentum going by celebrating daily wins and keeping the progress of the campaign at the top of all communication.
KICKOFF
Record a video from a senior executive to be distributed electronically to all employees. United Way speakers are also available to talk about the impact of gifts made to United Way Quad Cities. Plan a pep rally over breakfast or lunch.

UTILIZE AVAILABLE RESOURCES
The Workplace Campaign toolkit is available online at unitedwayqc.org/campaigntoolkit.
• This toolkit includes sample email messaging, video links, PDFs of collateral materials and more.
• Your United Way Relationship Manager can guide you through steps of running a digital campaign as well as help you goal set, train your team and more.
• e-Pledge – Do away with paper and use United Way’s FREE electronic pledge tool.
• Need something that is not available in the online tool kit? Ask your Relationship Manager!

COMMUNICATIONS
• Consolidate and coordinate outgoing communications to avoid overwhelming people.
• Promote any corporate match, corporate gifts or other incentives to increase contributions.
• Have your Campaign Committee make individuals 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 a day off with pay, rewards, or raffles for unique experiences. Consider using completed pledge forms as entrance into a raffle, rather than charging extra for a ticket.

EVENTS
Encourage participation in virtual volunteer opportunities on their own, or as a company.

• A full list of opportunities available can be found at UnitedWayQC.org/volunteer.
Find opportunities to create virtual events:
• Host a Zoom kickoff for employees to hear from company and campaign leadership, have a virtual silent auction with prizes like gift cards or lunch with the CEO, or have a virtual day of impact.
If possible, consider having in-person events once the campaign is launched to promote donation options and have a little fun.
• Popular events include dress down days, potluck lunches, silent auctions and bake sales. Your Relationship Manager can provide you with messaging and talking points for these 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 groups and take part in meaningful, year-round events, volunteer opportunities and engagement.
• **Tocqueville Society** ($10,000+)
• **Women United** ($2,500)
• **Leadership Society** ($1,000+)
• **African American Leadership Society** ($1,000)
• **Emerging Leaders** (Age 40 and younger)

RECOGNITION & THANKS
• Send thank-you e-cards from your CEO, Campaign Chair, Campaign Co-Chair, Campaign Coordinator or other team members.
• Send personal thank-you notes to each of your campaign committee members.
• Highlight givers of a certain level on a team call or monthly e-newsletter.
• If possible, host an event for donors who give at a certain level.
• Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet.
Q: HOW LONG SHOULD OUR 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 EMPLOYEES GIVE?
A: United Way offers a number of options, including payroll deduction, e-Pledge, cash, check, credit card and stock. Your United Way Relationship Manager can help you navigate which options are right to offer to your group.

Q: CAN WE COLLECT DONATIONS ONLINE?
A: United Way Quad Cities 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-check 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 UnitedWayQC.org.

Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?
A: Most campaigns take place between August and November, but they can happen at a time that is best suited for your organization.

Q: WHEN DOES PAYROLL DEDUCTION START?
A: Payroll deduction usually runs from Jan. 1 – Dec. 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 nonprofit program to receive your donation. However, the direct investment of your dollars designated to United Way Quad Cities goes further to strengthen education, income and health – the building blocks of opportunity – in the Quad Cities.
Give your employees an efficient, secure way to donate to United Way with e-Pledge.

WHAT IS e-PLEDGE?
e-Pledge is an online giving portal that allows you to collect employee pledges efficiently and securely. United Way builds and manages the portal, saving time and energy for you and your company. Features include:

- Multiple giving methods – payroll deduction, credit/debit card, bill later
- Ability to track department or location
- Customized, real-time reports available as spreadsheets or PDFs
- Ability for designations

ADVANTAGES FOR DONOR
- Secure: Employees will receive a link that allows them to sign in and create their own password
- Convenient: Employees will see last year’s pledge and use a calculator to determine this year’s gift
- Confidential
- Simple process: Donors can simply choose pledge method, select pledge amount, click communication preferences with United Way, submit gift, receive immediate confirmation

ADVANTAGES FOR COMPANY
- Free! There is no charge to your company.
- Efficient: Your staff is no longer physically distributing and collecting pledge cards.
- Downloadable CSV reports to import into payroll system.
- Accuracy: No manual data entry from pledge cards
- Environmentally friendly: No more paper pledge cards
- Secure: Safely store employees’ data and reduce the number of people who have access to pledge information
  - Java based
  - Data secured behind United Way Quad Cities firewall
  - Banking information and card numbers are not stored in the United Way database.
  - Credit/debit card transactions are handled by CyberSource, a third-party processor who is PCI compliant.

IS THIS OPTION RIGHT FOR YOU? NEXT STEPS:
- Confirm the basic requirements:
  - Majority of employees have work emails. You can supplement with paper pledge cards for those who don’t have emails.
  - Employees have access to email and internet.
  - Schedule your employee group meetings and kick off your campaign.

For more information or questions, email info@unitedwayqc.org or call 563.355.4310.
Thank you in advance for your efforts! By agreeing to lead your company/organization’s workplace campaign, you join a passionate and determined group of difference makers creating lasting change in the Quad cities.

You are a frontline volunteer who raises awareness about the vital role United Way Quad Cities (UWQC) 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 all Quad Citizens.

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