



# VIRTUAL CAMPAIGN PLAYBOOK



Great Rivers United Way





# STEPS TO A SUCCESSFULL CAMPAIGN

## PREPARE

- Set campaign dates. Plan your strategic messaging and give Great Rivers United Way staff plenty of time to get your online giving forms 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, 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 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.

## FINALIZE

- Wrap up 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 a group of donors.
- Thank your campaign team.
- Celebrate your results!



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

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## KEEP IT SHORT & SWEET

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

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## ESTABLISH OVERALL GOALS

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

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## COMMUNICATE WITH PURPOSE

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.

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## TALK ABOUT IMPACT

Provide impact equations – what does my donation do at various levels?

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## ADD IN A HEALTHY DOSE OF FUN

Daily prizes, trivia, raffles, etc. are a great way to keep people engaged. Consider having prizes for those who pledge early or on specific weeks, and maybe even for teams who reach their goals.

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## SHARE LIVE UPDATES

Celebrate your wins! Keep momentum going by celebrating daily/weekly 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. Or, start a meeting with a message of support, followed by a presentation – we can do in person, virtual, or recorded.

## UTILIZE AVAILABLE RESOURCES

- Visit our online Campaign Center at [www.gruw.org/campaign](http://www.gruw.org/campaign). There you will find sample messaging, our video, sweepstakes information, annual partner programs supported, impact statements and images, merchandise information, and much, much more!
- Our Resource Development Director can guide you through all steps of running a digital campaign as well as help you goal set and train your team.
- Need something that is not available on the Campaign Center? Just ask!

## COMMUNICATIONS

- Consolidate and coordinate outgoing communications to avoid overwhelming employees.
- Promote a corporate match, corporate gifts, or other incentives to increase employee 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, premium parking, gift cards, branded SWAG, unique experiences, lunch with a local celebrity, and approved casual days.
- Consider using completed pledge forms as entrance into the raffle, rather than an additional ticket cost.

## EVENTS

- Encourage employees to participate in virtual volunteer opportunities on their own, or as a company. There are several virtual opportunities on Ugetconnected, [www.uggetconnected.org](http://www.uggetconnected.org).
- Host virtual events: a Zoom kickoff featuring company and campaign leadership; a silent auction with prizes like gift cards or lunch with the CEO; or an online Day of Caring.
- 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. Great Rivers United Way can provide messaging and talking points for these events – just ask!

## LEADERSHIP GIVING

- Great Rivers United Way recognizes donors of \$500 or more as members of its Circle of Excellence. Special asks to donors in and approaching these giving levels can be effective in increasing support.

## RECOGNITION & THANKS

- Send thank you e-cards from your CEO or Campaign Committee.
- Send personal thank you notes to each of your Campaign Committee members.
- Highlight givers of a certain level on a team call or e-newsletter, or throw them a special thank you event.
- Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet.

# FREQUENTLY ASKED QUESTIONS

## **Q: HOW LONG SHOULD OUR VIRTUAL WORKPLACE CAMPAIGN RUN?**

**A:** The length of your campaign depends primarily on company size, with averages of 2-3 weeks for small and mid-size companies, and 3-4 weeks for larger or multi-site companies. These ranges will give you sufficient time to kick off your campaign, get the message out, and make your ask without overburdening staff.

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

**A:** Great Rivers United Way 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 billed gifts. We will work with you to decide on the best way and time for sending reports throughout your campaign. For more information, or a demonstration of the site, contact our Resource Development Director.

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

**A:** Yes! For additional and up-to-date information, please call our office at (608) 796-1400.

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

**A:** Most campaigns take place from July to November, but they can happen at any time throughout the year. We are happy to work on a timeline best-suited for your organization.

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

**A:** 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 designate your gift to one of our three Strategic Objectives, two of our internal programs, or up to five of our certified partners; however, the direct investment of your dollars to Great Rivers United Way's Community Investment Fund goes further to strengthen education, income, and health – the building blocks of opportunity – in the Coulee Region.

## **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 Coulee Region. You are a frontline volunteer who raises awareness about the vital role Great Rivers United Way plays in our community. Together with passionate supporters like you, we're leading the charge to improve education, income and health – the building blocks for a good life! We hope this guide will provide you with the necessary resources to run your campaign virtually. Please reach out to our Resource Development Director for additional support and guidance at any time.



# LIVE UNITED

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**Great Rivers United Way**