



**2021**

**CAMPAIGN**

**GUIDE**



United Way  
of Greater New Haven



# STEPS TO A SUCCESSFUL CAMPAIGN

## PREPARE

- Set campaign dates. Allow plenty of time to create strategic messaging and confirm a timeline for communications.
- 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.
- Run team challenges or prize incentive programs 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.

## 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.
- Finalize campaign results and 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.

- S SHORT & SWEET**  
Campaigns are best when kept to 3-6 weeks. 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.
- I IMPACT**  
Provide impact statements and share stories of real people to show what your donation makes possible. Photos and stories are available at [uwgnh.org/stories](http://uwgnh.org/stories).
- A ACCELERATE SUCCESS W/ GAMES**  
Daily prizes, trivia, internal 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.



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# BEST PRACTICES

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## KICKOFF:

- Engage a senior executive to share a message in person or digitally to be distributed to all employees. Campaigns are most successful when company leadership supports the effort!
- Host an in-person or virtual kickoff for employees to hear from company and campaign leadership. Invite a United Way representative to talk about the impact of gifts made to the United Way of Greater New Haven. Make it fun and interactive.

## UTILIZE AVAILABLE RESOURCES:

- The Campaign Success Toolkit is available online at [uwgnh.org/workplace-campaigns](http://uwgnh.org/workplace-campaigns). This toolkit includes sample email messaging, video links, PDF collateral materials and more.
- Your United Way Representative can guide you through all steps of running a campaign as well as help you goal set, train your team and more.
- Need something that is not available in the online tool kit? Ask your Representative!

## 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 team make personal asks of their colleagues. People give to people!

## INCENTIVES:

- Popular prizes include a day off with pay, a prime parking spot, rewards, or prize drawings.
- Incentives are best utilized when connected to an employees gift. For example, all new donors entered to win a UW t-shirt and we will pick 3 winners. Talk with your UW Representative to customize an incentive program to fit your needs.

## EVENTS:

- Find opportunities to create impact events. Host a lunch & learn or virtual day of impact. Host a poverty simulation, see your UW representative for details.
- Host special events that are fun and interactive. For a list of popular "FUN-raising" events, [visit our online workplace campaign toolkit](#).
- **Online tools are available to support virtual special events**

## VOLUNTEER:

- Encourage employees to participate in volunteer opportunities on their own, or as a company. Virtual and in-person opportunities are available.
- A full list of opportunities can be found at: [uwgnh.org/volunteer](http://uwgnh.org/volunteer).

## RECOGNITION AND THANKS:

- Send thank you 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.
- Spotlight an employee/department that has given or an employee who has volunteered for United Way in your newsletter or company meeting.
- If possible, host an event for donors who give at a certain level.

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# FREQUENTLY ASKED QUESTIONS

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

**A:** The average campaign runs for three to six weeks. Longer campaigns often take up additional time and resources for both the campaign coordinator and employees. Two to four 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 Greater New Haven 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. For more information, or a demonstration of the site, contact your United Way Representative.

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

**A:** Yes! In addition, **The CARES Act allows for charitable deductions for people who do not itemize their taxes - \$300 tax break for single filers and \$600 for joint filers.**

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

**A:** Most campaigns take place from September to 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 January 1 – December 31. However, United Way does not set your payroll schedule; it is a company decision.

## **Q: CAN EMPLOYEES CHOOSE HOW TO INVEST THEIR DONATION?**

**A:** Yes! Donors have the opportunity to give to the United Way Community Fund, or any of our focus areas they are most passionate about. We also make it possible to direct your donation to any registered 501c3 non profit.

# THANK YOU!

Thank you in advance for your efforts! By agreeing to lead your company's workplace campaign, you join a passionate group of campaign volunteers and community leaders creating lasting change in Greater New Haven.

You are a frontline volunteer who raises awareness about the vital role United Way of Greater New Haven plays in the community.

Together, we are part of the LIVE UNITED movement to build better, more equitable and more resilient communities.

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

**QUESTIONS?** Contact Jessica Teta:  
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