STEPS TO A SUCCESSFUL CAMPAIGN:

1. PREPARE
   • Select the dates for your Workplace Giving campaign. Campaigns are most successful in a two-week period.
   • Register your Workplace Giving campaign at least 5 weeks prior to your kick-off date here: https://donate.unitedwaywinecountry.org/Common/CampaignRegistration.jsp
   • Complete and return the Workplace Giving Checklist at least 4 weeks prior to your kick-off date
   • Assemble a campaign team by recruiting coworkers from different departments to help distribute messaging and encourage employee participation.
   • Create a timeline and messaging for distributing company-wide emails - announcement of the campaign prior to your kick-off date, campaign launch on kick-off date, mid-campaign reminder, final appeal, and thank you.
   • Create the welcome message for your employee's online donor portal.

2. EXECUTE
   • Once given access to your e-Pledge Administrator Portal, update the employee Welcome message.
   • Use your planned messaging to send your campaign launch email on your kick-off date.
   • Send messaging throughout the campaign on a company-wide level.
   • Run department/team challenges to encourage participation. For fun and creative ideas, see the United Way Special Events guide in our Workplace Giving Toolkit.

3. WRAP UP
   • Finalize campaign results using the reports in your e-Pledge Administrator Portal
   • Submit payroll deduction information to your HR or payroll processing department.
   • Send a thank you note to the entire company, especially your campaign team.
   • Celebrate your results!
BEST PRACTICES:

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’s Community Fund.

COMMUNICATIONS:
• Consolidate and coordinate outgoing communications to avoid overwhelming employees.
• Have your campaign team make individuals asks of their departments. If possible, this is always done best face-to-face. Consider phone calls instead of emails as well. People give to people.

CORPORATE GIFTS:
• Promote any corporate match, corporate gifts or other incentives to increase contributions.

INCENTIVES:
• Popular prizes include a day off with pay, rewards, or raffles for unique experiences.
• Consider using completed pledges as a raffle entry, rather than an additional cost for a ticket.

COMMUNITY INVESTMENT FUNDS:
• All donations made to United Way’s Community Investment Funds, including Pride United, Women United, Map One Sonoma, and the Emergency Readiness Fund, directly support local nonprofits to help them fulfill their urgent missions.

RECOGNITION AND 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.
• Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet.
RUN A ROBUST CAMPAIGN
Help make your digital campaign a strong and thriving endeavor by:

• Clearly stating your goals – dollars raised, number of participants, and average donation.
• Running your campaign for 2 weeks or less, this helps maintain momentum among employees.

SHARE YOUR IMPACT
• Working together is the best way to get things done. The same is true in United Way’s Workplace Giving.
  By participating in the campaign, employees show their commitment to helping others and, in turn, encourage coworkers to do the same.
• No matter how small, Workplace Giving donations made through scheduled payroll deductions help local nonprofits plan more effectively, so they can keep the lights on and make important investments for the future.
• Through United Way’s Workplace Giving, employee donations go directly to local nonprofits working to help neighbors, friends and families who live in communities throughout our five-county region.

BE SOCIAL
Ensure communication throughout your campaign:

• A picture is worth a thousand words! Encourage co-workers and company leadership to share stories, photos or videos of what participating in the campaign means to them.
• Personal touches help connect people to the mission and purpose of Workplace Giving.

SPREAD ENTHUSIASM
Celebrate your wins! Keep momentum going by:

• Using an enthusiastic tone in messages and conversations.
• Displaying the progress of the campaign at the top of all communications.
• Promptly reporting the final results of your campaign shortly after it’s conclusion.