



UNITED WAY
Bay County

A photograph of a woman with blonde hair and sunglasses, wearing a dark vest over a grey long-sleeved shirt, bending over to help a young girl. The girl is wearing a light purple jacket, pink pants, and a grey knit hat with a pom-pom. They are outdoors on a paved surface, possibly a sidewalk or street, with a black trash bag between them. In the background, there are street lamps and a clear blue sky. The image is framed by a red and yellow diagonal banner at the top and a blue and red diagonal banner at the bottom.

CAMPAIGN PLAYBOOK

STEPS FOR A **SUCCESSFUL** CAMPAIGN

Thank you so much for taking the role as the Employee Campaign Coordinator! You are not only providing a tremendous service to your company or organization, but your efforts make a difference by improving lives and building a stronger community here in Bay County!

We created this guide to help you achieve a successful campaign, but we are available for help along the way! Contact michaela@unitedwaybaycounty.org for additional resources.

1



Connect with Us

We want to better understand your goals and how you would like to approach your campaign. Meet with a United Way staff member to develop your strategy.

We can review your previous workplace campaign's performance and determine the challenges and new opportunities you can achieve!

2



Make A Plan

- Determine which dates work best for your campaign & develop a timeline to KICKOFF.
- Organize the donor experience that works best for your workplace. Whether that be paper or virtual pledges, internal fundraising, or your business providing a company gift.
- Set fundraising and participation goals.

3



Inspire Co-Workers

Tell people how their dollars are making a difference

- Set dates for a United Way staff member to share about the programs their fundraising will support
- Promote a company culture of giving back
- Share your story on why YOU give back to United Way

4



Make the Ask

- Kickoff your campaign with a fun event featuring an energetic and inspiring ask to give! We can help you do that in person or virtually.
- Create fun activities to drum up support and provide incentives for your colleagues to participate in..
- Have your CEO speak on why they participate. CEO commitment and leadership helps drive participation

5



Wrap Up & Thank

Thank the generous donors and celebrate your results!

- Finalize campaign results. Submit payroll deduction information to your HR or payroll processing department and work with United Way staff to ensure they receive totals and donor details
- Share the impact! Publicize the campaign results in your company newsletter, intranet, social media channel or more!

TIMELINE FOR ONE-WEEK CAMPAIGN



Monday

Host a kickoff event with United Way staff, show campaign video and host an agency speaker. Open up pledging and discuss plans for the next event. **Incentive Idea:** If you make your pledge by 2 p.m. today, you will be entered into a special gift card drawing

Tuesday

Thank event attendees and share new information (materials). If kickoff was virtual and recorded, invite those unable to attend to watch recording

Wednesday

Email touchpoint with campaign materials and reminder to make your pledge

Thursday

Final push! Share where the company/organization is on reaching the campaign goal

Friday

Wrap-Up Event! Recap the week and share what was raised by the company, have leadership thank the team for their contributions



TIMELINE FOR TWO-WEEK CAMPAIGN

Monday

Host a kickoff event with United Way staff, show campaign video and host an agency speaker. Open up pledging and discuss plans for the next event.

Incentive Idea: If you make your pledge by 2 p.m. today, you will be entered into a special gift card drawing

Tuesday

Thank event attendees and share new information (materials). If kickoff was virtual and recorded, invite those unable to attend to watch recording

Wednesday

Email touchpoint with campaign materials

Thursday

We encourage you to take a break from messaging to prevent donor fatigue

Friday

Recap the week and what activities are ahead

Monday

Show video, email campaign updates (possibly coming from leadership) and encourage everyone to pledge before Friday

Tuesday

We encourage you to take a break from messaging to prevent donor fatigue

Wednesday

Virtual or in-person event such as a panel discussion with agencies or trivia game at the end with a prize

Thursday

Final push to encourage pledging through an email touchpoint (include campaign materials / video)

Friday

Reminder email in the morning to pledge. End pledging in the afternoon and announce if goal has been met!

IDEAS AND BEST PRACTICES

KICKOFF

Invite employees to a virtual or in-person kickoff, or record a video from a senior executive to distribute electronically to all employees. United Way and Partner Agency speakers are also available to join virtual or in-person kickoffs to share the impact of gifts made to the United Way.

UTILIZE AVAILABLE RESOURCES

The Campaign Playbook and more available online resources can be found on our website in the Campaign Toolkit.

Your United Way contact can guide you through all of the steps of running a virtual or in-person campaign as well as help you set goals, train your team and more. Email michaela@unitedwaybaycounty.org if you have additional questions.

COMMUNICATIONS

Coordinate outgoing communications to avoid overwhelming employees. Be sure to promote any corporate match, corporate gifts, or other incentives to increase contributions.

Have your Campaign Coordinators make individuals aware of their team. If possible, this is always done best face-to-face or video-video. Consider phone calls instead of emails to facilitate interpersonal communication.

INCENTIVES

Popular incentives and prizes include a day off with pay, rewards or raffles for unique experiences.

Consider using their completed pledge forms as entrance into the raffle, rather than an additional cost for a ticket.

EVENTS

Consider having in-person events once the campaign has launched to promote donation options and have a little fun.

Host a virtual or in-person kickoff for employees to hear from company and campaign leadership, have a silent auction with prizes like gift cards or host a virtual bingo game. For more event ideas, check out the “Fundraising Ideas” one-pager.

RECOGNITION AND THANKS

Send thank you e-card from your CEO, Campaign chair(s), or other team members.

Highlight givers of a certain level on a team call of monthly newsletter.

If possible, host an event or have a special thank you for donors who give at a certain level.

Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet.

PLEDGING TOOLS

PAPER PLEDGE FORMS

- Best if your company is running the campaign in-person
- Requires no set-up - just let your United Way contact know how much you need
- Can be personalized
- A great tangible reminder for donors

VIRTUAL E-PLEDGE FORM

- Ability to send follow up emails to non-responders
- Company-branded
- United Way staff handles spreadsheet or results and will send to company employee for payroll deduction

E-Pledge Example

The screenshot shows a digital pledge form for McLaren, a partner of United Way of Bay County. The form is overlaid on a background image of a modern building. The form includes the following sections:

- Choose amount:** Buttons for \$26, \$50, \$100, and Other. A text input field shows \$ 26.00.
- Contact information:** Fields for First Name, Last Name, Mobile Number, Email*, Address, City, State (dropdown), and Zip*.
- How would you like to pay?:** A checkbox for "This is a secure 256-bit SSL encrypted payment". A Card Number* field with a masked number (XXXX XXXX XXXX XXXX) and a CVV* field.

	Paper	ePledge
Option to give via payroll, credit card or cash	X	X
Can be personalized and company branded	X	X
Can take one time payments	X	X
Ability to check status/get results any time		X
Can add link to company emails		X

FREQUENTLY ASKED QUESTIONS

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 or two weeks is sufficient to kick off your campaign, get the message out effectively, and make your ask without overburdening staff.

Q: ARE DONATIONS TO UNITED WAY TAX DEDUCTIBLE?

A: Yes. For additional information please contact your campaign coordinator.

Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?

A: Most campaigns take place sometime between July and November, but they can happen at a time that is best suited for your company.

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's your company's decision.

Q: IF EMPLOYEES WORK REMOTELY, CAN THEY STILL PARTICIPATE / RUN A CAMPAIGN?

A: Absolutely! Since 2020, companies have pivoted how they run their United Way campaigns. Your campaign coordinator can help you with ideas of how to run a successful online campaign.

Q: WOULD A UNITED WAY STAFF MEMBER OR PARTNER PROGRAM PRESENT TO OUR STAFF?

A: We would love to present to your employees about United Way services and partner programs that we fund! Contact your United Way campaign coordinator to schedule a time to come in and present.

THANK YOU!

Thank you in advance for all of your efforts! By agreeing to lead your company's workplace campaign, you join a passionate group of change-seekers creating lasting change in Bay County. Together with passionate supporters like you, we're united people and resources to improve lives and strengthen our community. We hope this playbook provides you with the necessary resources to run your campaign. Please reach out to your United Way coordinator for additional support and guidance throughout the duration of your campaign.