

# VIRTUAL CAMPAIGN GUIDE

2020-2021

United  
Way



United Way of Kern County

# 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-makers creating lasting change in Kern County.

You are a front-line volunteer who raises awareness about the vital role United Way of Kern County plays in the community. Together with passionate supporters like you, we're working to create a Kern County where every person receives a quality education, is financially stable, is healthy and thriving, and has a place to call home.

We hope this guide supplies you with the necessary resources to run your campaign virtually. Please reach out to your United Way Corporate Engagement Team for additional support and guidance throughout your campaign.

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# STEPS TO A SUCCESSFUL CAMPAIGN

## Prepare

01

Set campaign dates. Allow plenty of time to create strategic messaging and to work with United Way of Kern County to set up your online donation campaign.

02

Enlist the visible personal support of your CEO or senior decision maker.

03

Assemble a campaign team to help distribute campaign messaging across each department or team.

06

Set key points for distributing company-wide messaging, i.e., announcement of the campaign, launch day, mid-campaign, final push and thank you.

05

Conduct a Leadership Campaign. Host a Leadership Giving presentation with your senior management.

04

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

## Execute

07

Use your planned messaging to launch the campaign. Consider using video messages from your organization's leadership to encourage donations.

08

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

09

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.*

10

Utilize campaign team members to keep the campaign top of mind on team conference calls or personal ask emails. Conduct regular calls with team leads to discuss strategies and needs for their team.

## Wrap Up

11

Consider sending a thank you note to the entire company.

12

Thank your campaign team.

13

Celebrate your results!



CELEBRATE!

# MAKE IT SOCIAL

S

## Short & Sweet

- Digital campaigns are best when kept to 2 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 volunteer hours.

C

## Communicate

- A picture is worth a thousand words!
- Use photos or videos when possible in your communication and storytelling. Here's a YouTube playlist of our **recent success stories**.

I

## Impact

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

### \$5 A WEEK

provides new books to 3 children each month\*

### \$10 A WEEK

feeds a family of 4 with 3 months of hot meals\*

### \$20 A WEEK

funds a preschool classroom for five years\*

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.

# 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 of Kern County.

## Utilize Available Resources

- Your Corporate Engagement Team can guide you through all the steps of running a digital campaign, as well as help you goal set, train your team, provide sample email messaging, video links, pdfs of collateral materials, and more.

## 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 Lead make individual 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 options for prizes include a day off with pay, rewards, or raffles for unique experiences.
- Consider using their completed pledge as entrance into the raffle, rather than an additional cost for a ticket.

## Events

- Encourage employees to participate in virtual volunteer opportunities on their own, or as a company. For current volunteer opportunities contact Rachel Hoetker at [rachel.h@uwkern.org](mailto:rachel.h@uwkern.org)
- The full list of opportunities available can be found on our volunteer page.
- 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 jeans days, sports jersey day, potluck lunches, silent auctions, and bake sales. Your Corporate Engagement Manager can provide you with messaging and talking points for these events.

## Recognition & Thanks

- Send thank you e-cards to your donors from your CEO, Campaign Chair, Campaign Co-Chair, Campaign Coordinator, or other team members.
- Send personal thank you notes to each of your Campaign Team members.
- Highlight givers of a certain level on a team call or monthly e-newsletter.
- If possible, host an appreciation event for donors who give at a certain level.
- Publicize results and reiterate the impact of gifts via your company newsletter, email, or intranet.



# VIRTUAL CAMPAIGN KICK-OFF PLANNING

## 1 FIRST:

### Confirm CEO or Executive Attendance

Before picking an event date, work with the CEO or Members of your company's Executive Team to book their time and ensure they are available to host the kick-off event(s). Great leadership inspires others! Also consider whether your CEO would like support in scripting their speaking remarks, or would like to speak to slides.

## 2 3-5 WEEKS BEFORE:

### Draft Invitation

Draft up your invitation. If you need approval from others, consider starting a week earlier.

### Confirm Invite List

Pull and sort your invitation list. Work with your HR department to ensure you have captured all staff. Divide up the list (e.g., by department) if you are hosting multiple events.

### Request Other Key Speakers

If desired, work with your United Way Corporate Engagement Manager to request an impact speaker, to really drive home the positive impact you're making in the community. Please submit this request as early as possible!

### Prep Your Campaign Tool

If you haven't started already, take steps to get your campaign tool up and running to capture donations on event day.

## 3 2 WEEKS BEFORE:

### Send Invitation

Send out invitation(s), providing the web conferencing, or meeting room information in the booking.

### Collect RSVPs

Consider tracking RSVPs, so you can get a better idea of how colleagues are responding to your invitation.

## 4 1 WEEK BEFORE:

### Send a Reminder

Consider sending a reminder invitation or nudge, if many colleagues haven't responded to your initial invitation.

### Update the Invitation

If desired, make updates to the calendar invitation to include an agenda, presentation document, list of speakers, or other key information. This update can also serve as a reminder to confirmed attendees.

## Confirm Key Speakers

Ensure you have all necessary pieces to enable a successful kick-off presence for your CEO or Executives. Check in with your United Way impact speaker to ensure everything is on track, and see if they have any questions (especially about how to access your kick-off virtually).

## Prep Your Campaign Tool

Check in on progress with your campaign tool. Will it be ready to go on event day?

## 5 DAY BEFORE:

### All Systems Go

Complete an 'all systems go' run-through to test your conferencing system, presentation documents, etc. This will put your mind at ease, and may help to identify issues you can rectify before event day!

### Test Your Campaign Tool

Ensure your campaign tool is ready to accept donations.

## 6 EVENT DAY:

### Last-Minute Test

Test your conference system and any other technology—just in case.

### Inspire!

Your event is virtually 'attended' by many, and goes off without a hitch. Your entire organization is inspired to support their community and participate in this year's Campaign!

### Immediately After the Event – Send the Donation Link

Now that you've inspired everyone, give them the means to support their community by sending out the donation link. If you're hosting multiple events, send the link out after the last kick-off event has concluded.

## 7 FOLLOW UP:

### Thank Others

Send a follow-up communication to thank staff for joining your kick-off event, and encourage them to visit the pledge tool to consider making a donation.

Thank key contributors to your kick-off, too (your impact speaker, and anyone who helped you plan). They'll be pleased to be recognized!

# MENU OPTIONS

## TACTICS & TOOLS TO CONSIDER

### Engagement & Fundraising

#### Fitness Challenges

Promote a healthy competition between co-workers or other company departments. Stay healthy and active by walking, running, cycling, and other activities that are measured in distance to join virtual races.

#### Karaoke

Bring singing fun to your employees with virtual karaoke! All you need is a video conferencing tool (like Zoom), karaoke clips on YouTube (chosen by the singers), and the Watch2Gether app. And with employees at home, singers can even add a prop or two for their performance. This is a great option for employee engagement and fundraising activity (Participation entry fee donated to United Way of Kern County).

#### Mini-Campaigns (More Options, Smaller Target & Smaller Goal)

Smaller and more directed campaigns are created through the year as needs arise and will be made available. These campaigns focus on a more subjective need with a tangible cost-value benefit that's easy for a company to set a goal around.

#### Online (Silent) Auction

An online auction allows the bidders to engage in friendly competition to claim the prize. It offers a wider reach for participation, flexible duration (7-10 days recommended), and allows donors to bid directly from the device of their choice. Source some fun items or be creative and assemble theme baskets to auction.

#### Virtual Bingo

Campaign managers can easily organize a fun Bingo game to play remotely with colleagues anywhere in the world. They can charge players a set amount to buy in (donated to the United Way Campaign) and create a coveted prize to give players the motivation to buy more cards in order to increase their chances of winning. They can set up a Zoom session and call out the numbers via a generator.

#### Virtual Happy Hour or Dinner with the CEO

Raffle off the opportunity to have a company sponsored virtual happy hour or dinner with the CEO. You could simply provide an e-gift card for the event, and everyone who pledges during the campaign is entered into the raffle. This encourages recurring gifts rather than one-time smaller donations.

#### Virtual Trivia

With virtual trivia, employees can remotely connect and engage with each other in a fun and exciting way to raise funds. Using TriviaHub, you can create custom trivia games based on trendy pop-culture topics or subjects that matter most to them. All the employee will need to participate in the trivia game is to pay an entry fee (donated to the United Way Campaign) and have access to a web connection via Zoom. Play solo or make teams for friendly competition.

#### Volunteer Guides

Pick volunteer opportunities for your employees—to participate as a team or individually.

#### Workout Classes

Employees can get together during their next work day break to boost their energy, clear minds, and get their bodies moving with a virtual fitness class. Led by a professional fitness instructor, this break-time fitness class is perfect for keeping employees motivated throughout their day, work, and campaign giving! To participate, all they'll need is a web tool like Zoom and to pay an entry fee (donated to the United Way Campaign). This is a great way to benefit the health of employees, raise awareness around issues in health for families and children, and ultimately drive donations toward United Way of Kern County's work.

#### Other Virtual Activities & Competitions to Consider Hosting/Booking

Your campaign team can also look into the following ideas to raise funds by charging a small donation to participate in:

- Virtual classes: cocktail lesson from a mixologist, DJ class, dance lessons for couples, flower arranging, or cooking class
- Wine tasting event
- Booking a musician/magic show to watch together
- Host a costume contest—best costume wins a prize
- Hosting a video game tournament—and ask the CEO to play the winner
- Challenge coworkers to a lip-sync battle—video with the most votes win!
- Have a colleague host a family paint night or start a virtual book club
- Host an amateur virtual art and photography festival—and turn it into a competition
- Have employees donate items to an online yard sale
- Lego building competition—and include a kids' category!
- Raffle for paid Time Off or e-gift cards!



## MENU OPTIONS: TACTICS & TOOLS TO CONSIDER *continued*

### Education & Communication

#### **Stories Videos**

An inventory of our success stories and community impact videos to use in your presentation and/or other methods of delivery.

#### **Lunch & Learn**

Educate your employees about the needs of our community or on a specific issue—like our VITA Program—over a virtual lunch.

#### **Targeted Emails**

A series of drip emails with copy, graphics, and/or video snippets to educate your employees about United Way to inspire them to support your Campaign. There are costs associated and include fundraising possibilities.

### Incentive.

#### **Hall Pass**

Too many Zoom meetings getting your employees down? Let them donate a pre-established amount to your campaign to get out of an upcoming Zoom meeting. You can limit the amount of Hall Passes available to each employee and create a fun virtual Hall Pass they can fill out and send in response to the meeting invite.



# FREQUENTLY ASKED QUESTIONS

## Q How long should our virtual 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 we collect donations online?

**A** United Way of Kern County offers an 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-checks gifts. For more information or a demonstration of the site, contact your Corporate Engagement Manager.

## Q Are donations to United Way of Kern County tax deductible?

**A** Yes. For additional information, please visit [UWKern.org](http://UWKern.org).

## Q When should our giving campaign run?

**A** Most campaigns take place from July to November, but they can happen at a time best suited for your organization.

## Q When does payroll deduction start?

**A** Payroll deduction usually runs from January 1–December 31. However, United Way of Kern County does not set your payroll schedule; it is a company decision.

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