

# CAMPAIGN



# GUIDE

# LIVE UNITED

TOOLKIT FOR EXECUTING A SUCCESSFUL  
WORKPLACE CAMPAIGN!

CAMPAIGN GUIDE





# 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 the Pikes Peak region.

You are a frontline volunteer who raises awareness about the vital role Pikes Peak United Way plays in the community. Together with passionate supporters like you, we're working to create a Pikes Peak region 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. Please reach out to your Pikes Peak United Way Resource Development Manager for additional support and guidance throughout your campaign.

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# STEPS FOR A SUCCESSFUL CAMPAIGN

## PREPARE

01

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

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.

04

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

05

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

06

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

## 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!**



# MAKE IT SOCIAL



## S SHORT & SWEET

- 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.

## I IMPACT

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

### \$5 A WEEK

Assists 6 families with basic needs by personalized referrals from 2-1-1

### \$10 A WEEK

Connects 1 teen experiencing homelessness with a youth shelter for basic needs

### \$25 A WEEK

Helps prevent 1 family from being evicted from their residence through housing assistance

### \$42 A WEEK

Provides groceries and household items twice a month for a family of 4

\*Based on donating bi-monthly for one year.

## 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

## KICK-OFF

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 Pikes Peak United Way.

## UTILIZE RESOURCES

Your Resource Development Manager can guide you through all the steps of running a campaign, as well as help you set goals, train your team, provide sample email messaging, video links, pdfs of collateral materials and more.

## COMMUNICATION

- 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.

## INNCENTIVES

- 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 volunteer opportunities on their own, or as a company. For current volunteer opportunities contact Hillary Saba, Volunteer and Events Coordinator at [hillary@ppunitedway.org](mailto:hillary@ppunitedway.org)
- The full list of opportunities available can be found at [www.ppunitedway.org/i-can-volunteer/](http://www.ppunitedway.org/i-can-volunteer/)
- Find opportunities to create events. Popular events include jeans days, sports jersey day, potluck lunches, silent auctions, and bake sales. Your Resource Development Manager can provide you with messaging and talking points!

## LEADERS IN GIVING

When asking for donations, remember that Pikes Peak United Way's Leaders in Giving program is a great way for employees to extend their impact and deepen their engagement with our work. Employees can also join an affinity group and take part in meaningful, year-round events, volunteer opportunities and engagement.

**Axis de Tocqueville Society (\$10,000+)**  
**Leaders in Giving (\$1,000+)**

**Affinity Groups:**  
**Women United (\$1,000+)**  
**Emerging Leaders (\$250+)**

## 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 at team meetings 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.





# CAMPAIGN KICK-OFF PLANNING

## 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.

## WEEKS BEFORE

**Draft 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 Key Speakers** - If desired work with your Resource Development 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 Pledge Tool** - Take steps to get your pledge tool up and running to capture donations on event day.

## TWO WEEKS BEFORE

**Send Invitation** - Include all relevant information such as date, time and location.

**Collect RSVPs** - Consider tracking RSVPs so you can get a better idea of how colleagues are responding.

## ONE WEEK BEFORE

**Send a Reminder** - Consider sending a reminder invitation or nudge.

**Confirm Key Speakers** - Ensure you have all necessary pieces to enable a successful kick-off. Check in with your impact speaker to confirm everything is on track and to answer any questions they may have.

**Prep Your Pledge Tool** - Check your pledge tool progress to make sure it will be ready to go.



## DAY BEFORE

**Test** - Complete a run-through to test audio/visuals, presentation, documents, etc. This will put your mind at ease, and may help to identify issues you can rectify before event day!

**Test Your Pledge Tool** - Ensure your pledge tool is ready to accept donations.

## EVENT DAY

**Last-Minute Test** - Test everything again, just in case!

**Inspire!** - Remember during your presentation to inspire your attendees!

### Immediately After - 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.

## FOLLOW UP

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

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



# TACTICS & TOOLS TO CONSIDER

## HOST A CRAFT & BAKE SALE

This popular activity gives everyone a chance to share their hobbies and special baking talents. All items should be donated and proceeds go to the Campaign.

## CHILI COOK OFF!

Employees cook their favorite recipe and enter it into a Chili Cook Off contest. A panel of “chili experts” selects the Official Chili Champion.

## PENNY WARS

Each penny is worth one point and counts “positively” toward a department's total; other coins count negatively (a nickel is worth minus 5, a dime is minus 10, etc.). The department with the most points at the end wins!

## BINGO

Sell bingo cards to employees to play for prizes.

## PIE IN THE FACE

Employees pay \$5 for a pie to be thrown in the face of the executive of their choice!

## WORK ATTIRE

Have employees pay \$5 to be able to wear their favorite sports team apparel or employees pay \$1 to be able to wear jeans to work for one day, \$5 to wear jeans for a week.

## WORKOUT CLASS

Employees pay a fee (your choice) to participate in a break-time workout class led by a professional fitness instructor. This is a great way to benefit the health of employees and raise awareness around health issues for families.

## TRIVIA NIGHT

Create custom trivia games and host a trivia night. Employees pay an entry fee to participate. Play solo or make teams for friendly competition. Don't forget some food, drinks and prizes!

## HAVE FUN WITH MANAGEMENT

Let's face it, people will donate money to see their boss do something silly. What ideas do you have?

# INCENTIVES

- Employee parking spot
- One-day PTO
- Lunch with the boss
- Car wash tickets
- Tickets to a movie, concert or special event
- Leave early on a Friday
- Golf or activity with the boss
- Extra-long lunch hour
- Drawings based on giving levels (i.e. gift cards, gift baskets, etc.)
- Gift cards

Share photos on social media!

Tag: [ppunitedway](#)  
[#LiveUnited](#)

*Thank!  
You!*



# COMMUNICATION & EDUCATION



## 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 food insecurity - over lunch.



## PHILANTHROPY PLATFORM

Publish information about critical local issues, moving personal stories, fundraising and volunteer opportunities on philanthropic platforms on an ongoing basis.



## TARGETED EMAILS

Keep your company's enthusiasm going by sending follow-up e-mails every few days during the campaign with facts about Pikes Peak United Way. Include graphics, and/or video snippets!



## CAMPAIGN UPDATES

Track campaign results and communicate overall numbers to team. You may also share more specific department results with your leadership and campaign committee.





## 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 to two weeks is sufficient to kick off your campaign, effectively message and make your ask without overburdening staff. An exception could be if you are the campaign coordinator at a large or multi-site company.

## Q: How do we collect donations?

**A:** Pikes Peak United Way 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. We can collect via payroll deduction and credit card gifts. For more information or a demonstration of the site, contact your Resource Development Manager.

## Q: Are donations tax deductible?

**A:** Yes. For additional information please email [davidamess@ppunitedway.org](mailto:davidamess@ppunitedway.org)

## Q: When should our giving campaign run?

**A:** Most campaigns take place from August to November, but they can happen anytime that is best suited for your organization.

## Q: When do payroll deductions start?

**A:** Payroll deductions usually run from January 1st–December 31st. However, Pikes Peak United Way does not set your payroll schedule; it is a company decision.

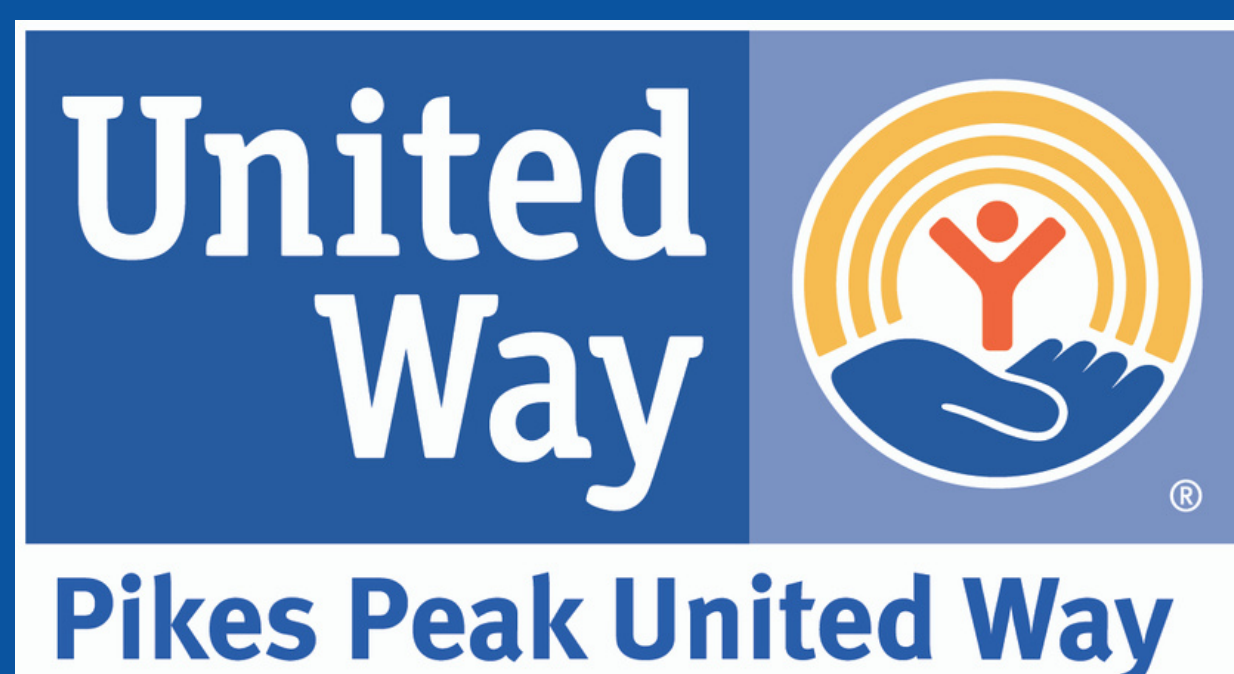




**TOGETHER** we can change how  
people can make a difference.

**TOGETHER** we can change the  
course of someone's life.

**TOGETHER** we will forever  
change Colorado Springs for  
the better.



**ppunitedway.org**



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