



CAMPAIGN TOOLKIT

Hosting a Successful United Way Campaign with Social Distancing Safety in Mind

This year, your United Way of Idaho Falls and Bonneville Campaign might need to look a little bit different due to social distancing and other changes brought on by the pandemic. Never fear! United Way is here with tips, tools and support to help you easily transition to campaigning in a new way, all while achieving fantastic results!

You Have the Tools!

- Visit our Campaign page at unitedwayif.org for materials, instructions and promotional items.
- For more information, contact Christine Leusch at 208-522-2674 or email cleusch@unitedwayif.org

The basics of a successful fundraising campaign remain the same Covid-19, or not.

- Support from your organization's CEO or highest local leader – they give, they encourage employees to give, and when it's over they are sure to celebrate results and thank your employees for participating.
- **The pledge is king!** Special fundraising activities are super fun, but the most powerful way people can support the United Way Community Fund is by making an easy payroll deduction pledge – it's the gift that keeps giving all year!
- Setting a goal and making a plan for success.
- Using United Way's tools and materials to educate and engage employees, promote the campaign and make giving easy. **NEW** this year we have several short videos that you can use to share the work we do.
- Leaning on your United Way for support and creative ideas – we are here for you!
- Ensuring 100% of the employees are invited to make a donation.
- Make it fun – the campaign is a great way to help local children and families in need AND it's a perfect way to build employee morale! www.unitedwayif.org/workplace-campaign

What might be different?

- The place where you campaign (maybe people are working from home now or in shifts). If that's the case for you:
 - Most of your campaigning should be online using email, your company intranet, Yammer, Slack, social media, Zoom, WebEx, or other online platforms.
 - Be mindful of those who still might be working in the office and be sure to put up some posters, banners, and signs so it looks and feels like campaign time!
 - For those that are at work, think about how they might be entering your building differently and how they are spaced out. Perhaps you need to put signs and posters in locations to reflect these changes.
- The way you communicate and engage with your fellow employees. Digital materials are key. We have some of new materials for you to use as is or customize to add your special sauce. **The link to new materials and tools is www.unitedwayif.org/workplace-campaign**

Things you'll need from your workplace to succeed

- Contact list with names and work emails for all employees
- Computer with webcam and microphone
- Ability and access to your organization's online meeting software
- Leadership support (we can't say this enough)
- Helpers

Things you'll need from United Way of Idaho Falls and Bonneville County

- Training, a bit of coaching and support – we are here for you every step of the way!
- Online and/or paper pledge forms
- Promotional materials and templates for online campaigning
- Promotional materials, games and banners to decorate your workplace and add some fun.



Best practice sample plan for a United Way of Idaho Falls and Bonneville County campaign with social distancing in place

Three Weeks Prior Campaign

- Meet with your United Way representative over the phone or by video conference.
- Meet with your company leadership to ask for support (top down campaigns have the best results)
- For larger organizations, build a team of campaign helpers (you might want more technically savvy people on your team to help facilitate online activities, presentations, meetings, and more. Pull in marketing and communications team members if you can to help craft your communications plan).
- Develop your campaign plan;
 - Determine your campaign dates. We recommend a two-week campaign period. Anytime from now through November, fall tends to be the best time.
 - Set your campaign goals (participation and donations).
 - Make a communication plan
 - What information will you use?
 - When will it be sent/shared?
 - Where will information be sent or displayed?
 - How will you deliver information and pledging opportunities?
 - Who will you share information about your organization's United Way of Idaho Falls and Bonneville County (all employees always, but maybe publically on your social media channels, or to your partners and vendors).
 - Order signs, posters, pledge forms, and other campaign materials from your United Way representative.
- NEW – Talk to your payroll department about roll-over pledging. If they can accommodate work with your United Way to put a roll-over plan in place. This is a proven best practice and one that you really should embrace.**
- Invite your United Way representative to do a quick online presentation about the intersection of community needs and United Way of Idaho Falls and Bonneville County's work during your organization's online meetings. We would love the chance to share stories and support YOUR United Way campaign efforts. We can call into any/all existing staff meetings or join a campaign specific meeting. Just invite us!
- Add some fun.** Just because the majority of your campaigning might be online doesn't mean it can't be fun and a great opportunity for employee moral building. We have suggestions and tools to help you with this.

During Your Campaign

- Bring the campaign to life in your physical work spaces – have our colorful promotional/educational posters, signage, and other displays installed on the day you kick off your campaign. Consider employee entry locations, lobbies, lunch rooms, common areas, cafeterias, and even restrooms!

- Day one, first thing in the morning: blast out an email or a quote from your CEO or highest ranking local leader kicking off your United Way of Idaho Falls and Bonneville County campaign, stating he/she made a gift with a “*Why I give*” statement, and encouraging all employees to give. Include a hotlink to your online giving portal, campaign dates and if you are hosting special online or in-person events now is a great time to include a schedule.
- Send out United Way of Idaho Falls and Bonneville County campaign email blasts throughout your campaign. You’ll have access to 5 campaign videos, United Way success stories, community needs details, and much more.
- For people who are physically in the office, be sure to have paper pledge forms available (we recommend putting them on desks the night before your kickoff with return instructions to avoid personal contact).
- Mid-campaign, share results to keep your team motivated! Consider some sort of challenge to get those that haven’t given yet motivated to give. If your goal is met, perhaps your CEO could dye their hair a crazy color, take a pie in the face, make a lip sync video for all employees to see, or walk through the office in a crazy get-up for those who are there!
- Campaign wind down time. Keep the energy high all the way through the last day of your campaign. Add a fun count down at the three days to go mark to encourage last minute donations.

Post Campaign

- Have your leader announce final results and thank all employees for participating. If they offered do a crazy stunt if a goal was met, now is the time!
- Process pledges and donations
 - Collect all paper pledge forms from employees.
 - Give United Way copies of pledge forms and all cash and check donations.
 - **NEW** – this year we are offering contactless pledge delivery as well as traditional in-person pick-ups. Contact your United Way at 208-522-2674 for instructions.
 - Give your payroll department copies of all payroll deduction pledge forms.
- Thank all employees for giving.
- Pat yourself on the back for a job well done! Because of YOU and YOUR efforts low-income children and families in need all across our community will receive the support they need to have better lives. **Your Campaign Makes a BIG Impact in our Community!**

