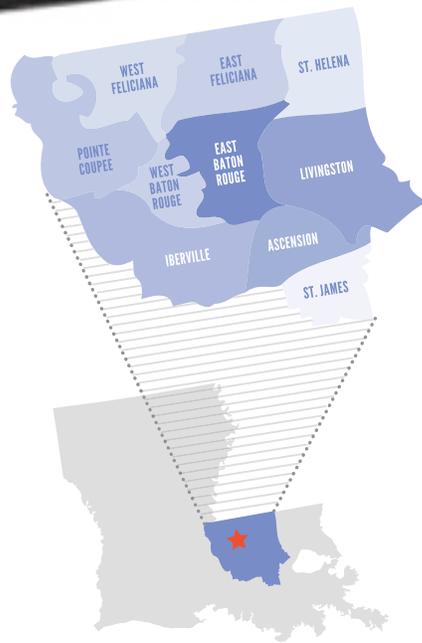


CAPITAL AREA UNITED WAY DIGITAL CAMPAIGN GUIDE

2020



STEPS TO A SUCCESSFUL CAMPAIGN

PREPARE

- 1 to 4 months ahead of the campaign: Meet with your Capital Area United Way (CAUW) Corporate Relationship Manager (CRM) to review past campaigns and opportunities to boost campaign success.
- 1 to 4 months ahead of the campaign: Determine the virtual platform that will be used for the campaign and the exact campaign dates.
- Allow plenty of time to create strategic messaging and to get your online donation portal set up.
- Assemble a campaign team to help distribute campaign messaging across each department or business unit. A good ratio is one campaign team member per every 25 employees.
- Have virtual meetings with your team regularly.
- Set key points for distributing company-wide messaging (i.e., announcement of the campaign, launch day, mid-campaign, final push and thank you).

EXECUTE

- Use your planned messaging to launch the campaign. Consider using video messages from your organization's leadership to encourage donating.
- Send messaging throughout the campaign on a company-wide level.
- Consider hosting a campaign kickoff event where your organization hosts team challenges to encourage participation.
- Utilize the campaign team members to keep the campaign top of mind during team conference calls or personal ask emails. Conduct regular calls with the team leads to discuss strategies and needs for their team.

WRAP UP

- Finalize campaign results with your online giving platform within 2 weeks after the campaign. Notify your CRM, Campaign Team and/or Management Team with your results. Payroll deduction information should be submitted to HR or your payroll processing department.
- Send a thank you email to the entire company and donors.
- Thank your campaign team.
- Celebrate your results!

MAKE IT S.O.C.I.A.L.

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, volunteer hours.

C

COMMUNICATE

A picture is worth a thousand words! Use photos or videos when possible in your communication and storytelling. This helps connect people to the mission.

I

IMPACT

Provide impact equations to demonstrate what an individual donation can accomplish.

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.

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 Capital Area United Way.

UTILIZE AVAILABLE RESOURCES

- The Workplace Campaign toolkit is available at www.cauw.org/campaign-toolkit. This resource includes sample email messaging, video links, PDFs of collateral materials and more.
- Your CRM can guide you through all of the steps of running a digital campaign as well as help you set goals, train your team and more.
- Need something that is not available in the online tool kit? Ask your CRM!

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 Committee/Team make individual asks of their co-workers. If possible, this is always done best face-to-face. Consider phone calls instead of emails as well. People give to people.

INCENTIVES

- Popular prizes include a day off with pay, casual day, 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

- Encourage employees to participate in virtual volunteer opportunities on their own, or as a company while practicing social distancing. Opportunities include writing encouraging notes to health care providers, first line responders, senior citizens, Veterans or making videos of yourself reading books to be shared with funded non-profit in our 10-Parish service area working with children.
- The full list of opportunities available can be found at www.cauw.org/volunteer
- 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. Reference the Virtual Fun-Raising Ideas.
- Popular events include dress down days, potluck lunches, silent auctions and bake sales. Your United Way Corporate Relationship Manager can provide you with messaging and talking points for these events.

CAMPAIGN BEST PRACTICES (continued)



GIVING SOCIETIES

When asking for donations, remember that CAUW Giving Societies are a way for employees to extend their impact and deepen their engagement with our work. Based on their giving level, employees can join the following Giving Societies and take part in meaningful, year-round events, volunteer opportunities and engagement.

ALEXIS DE TOCQUEVILLE SOCIETY

The Alexis de Tocqueville Society is comprised of local philanthropists who invest in CAUW through annual gifts of \$10,000 or more. Through their contributions, Alexis de Tocqueville Society members show how their personal investments and civic-minded spirits create a powerful legacy that will shape our community's future.

MEMBERSHIP BENEFITS

- Joining a national network of philanthropic leaders who are engaged locally to create long-lasting, positive changes
- Partnering with a quality organization and dedicated staff; ensuring that financial investments, resources, and time are efficiently allocated in local communities to maximize community impact
- Invitations to attend United Way Worldwide events, conferences, and leadership forums
- A copy of Democracy in America book by Alexis de Tocqueville
- Semi-Annual Newsletter
- Listing in Community and Annual Reports
- Invitations and special "perks" to all Capital Area United Way events

GOTTLIEB SOCIETY

Gottlieb Society is a diverse group of local leaders fighting for the education, income stability, health and basic needs of every person in our 10-Parish service area. Gottlieb Society members support CAUW with an annual gift of \$1,000 or more (less than \$20/week), which is invested in the most effective, measurable programs that help more than 250,000 people in our community.

MEMBERSHIP BENEFITS

- Name listed in Capital Area United Way's Annual Report and website
- Invitations to special events
- Opportunities to network and meet with donors who share a like-minded spirit of philanthropy
- Updates on the impact of your investment
- Access to exclusive volunteer opportunities

RECOGNITION & THANKS

- Send thank you e-cards from your CEO, Campaign Chair, Campaign Co-Chair, Campaign Coordinator, and/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.
- Host an event to thank donors. If possible, host an event to thank donors who give at one of the giving society levels.
- Publicize results and reiterate the impact of gifts via your company newsletter, email, or intranet.

FREQUENTLY ASKED QUESTIONS

Q: HOW LONG SHOULD OUR VIRTUAL WORKPLACE CAMPAIGN RUN?

A: The average virtual 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 large or multi-site company.

Q: HOW CAN WE COLLECT DONATIONS ONLINE?

A: Capital Area United Way offers a free 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 United Way Corporate Relationship Manager.

Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?

A: Most 2020 campaigns will take place from August to December, but they can happen at a time that is best suited for your organization.

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 is a company decision.

Q: ARE DONATIONS TO UNITED WAY TAX DEDUCTIBLE?

A: Yes, and there is a new financial incentive for Americans to give generously to qualifying charities, including Capital Area United Way and many of our community partners. The new universal tax break for charitable donations was included in the final \$2 trillion COVID-19 stimulus package signed into law last week and will go into effect starting with the 2020 tax year.

The measure grants taxpayers an “above-the-line” deduction for up to \$300 in charitable donations given in 2020. For example, if you take the standard deduction and give \$300 to charity, you will get a \$300 tax break in addition to the standard deduction. Now is the perfect time to take advantage of this “above-the-line” opportunity while supporting our community.

Here is the tax benefit break down for those taking standard deductions, itemized deductions and corporate giving:

Standard Deduction

For people who take the standard deduction, the CARES ACT allows you to take a tax deduction for contributions made to qualified charitable entities up to \$300 per year starting in 2020 – this deduction is “above-the-line.” The 2020 Standard deduction is \$12,400 for individuals and \$24,800 for married couples filing jointly. Therefore, any donation to qualifying charities of up to \$300 will be added to the standard rate of deduction. This deduction applies for 2020 and beyond.

Itemized Deduction

For people who file for itemized deductions, the CARES ACT allows you to take a tax deduction of up to 100% of your Adjusted Gross Income (AGI) for contributions to qualifying charities starting in 2020. The new law temporarily lifts the limits on charitable giving from 60% of a taxpayer’s AGI to 100% for 2020.

Corporate Donations

For corporate donors, the CARES ACT allows an entity to take a tax deduction of up to 25% of their Adjusted Tax Income for contributions to qualifying charities starting in 2020. The new law temporarily lifts the limits from 10% of adjusted taxable income to 25% for 2020.

Capital Area United Way advises you to consult your tax professional for additional information and clarification about these changes in charity giving for 2020.



Thank you in advance for your efforts! By agreeing to lead your company's workplace campaign, you join a passionate group of change-seekers and trailblazers creating lasting change in our 10-Parish service area.

You are a frontline volunteer who raises awareness about the vital role Capital Area United Way in the community. Together with passionate supporters like you, we are leading the charge to strengthen the areas of education, income stability, health, and basic needs in our community.

We hope this guide will provide you with the necessary resources to run your campaign virtually. Please reach out to your CAUW Corporate Relationship Manager who can provide additional support and guidance throughout your campaign.

If you know of a company that would like to start a Workplace Campaign at their business, they can contact Amey Shortess Crousillac at amey@cauw.org.

THANK YOU

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WHERE THERE'S A NEED,
THERE'S A WAY.

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