

# CAMPAIGN CHAMPION GUIDE

Running a United Way Campaign (In-Person, Hybrid, or Virtually)



**UNITED WAY**  
Greater Rochester  
and the Finger Lakes

# A MESSAGE FROM THE CAMPAIGN CHAIR



**VINCE LECCE, ROCHESTER MARKET PRESIDENT  
& PRIVATE BANK MARKET LEADER SENIOR VICE  
PRESIDENT AT KEYBANK**

Thank you for representing your organization as a United Way Campaign Champion. We are thrilled to have you join us in energizing our colleagues to support our local communities.

By leading your workplace campaign, you **join a passionate group of changemakers** to raise awareness of United Way of Greater Rochester and the Finger Lakes' vital role, build camaraderie on your team, and support your organization's philanthropic and engagement goals.

I am excited to lead the United Way campaign this year. At KeyBank, we've always believed that our

responsibility extends beyond banking and financial services. It's about investing in people, strengthening neighborhoods, and empowering individuals to achieve their potential. That's why this partnership with United Way resonates so deeply with us—it's built on a foundation of shared values and a mutual commitment to creating lasting, meaningful change.

**Change is possible, and we see it happening from all corners of our six-county region**— from helping families put nutritious food on the table and navigate the path to homeownership to children gaining the confidence, skills, and relationships to thrive in and out of the classroom and older adults connecting to 24-hour access to resources for mental health support and more. Because of supporters like you, your United Way can create change for our neighbors and communities—one dollar, volunteer hour, and connection at a time.

As we work together, please review our Campaign Champion Guide for ideas to engage team members and best practices for structuring a workplace campaign. Your United Way representative is available to help you develop your organization's campaign strategy to achieve your goal. No matter your campaign's size, scope, or tone, your United Way team is here to support you.

Thank you so much for your commitment as a Campaign Champion.

Everyone can make a difference for a neighbor, but **united as changemakers, we can make a change for all.**

## Online Campaign Resources

Email a United Way Relationship Manager ➔ [contactus@unitedwayrocflx.org](mailto:contactus@unitedwayrocflx.org)  
Campaign Toolkit (Print and Digital) ➔ [unitedwayrocflx.org/workplace-campaign](https://unitedwayrocflx.org/workplace-campaign)  
Engagement and Volunteer Opportunities ➔ [unitedwayrocflx.org/get-involved](https://unitedwayrocflx.org/get-involved)  
Social Media ➔ [f](#) [@](#) [in](#) [@unitedwayROCFLX](#)

# 5 STEPS TO RUNNING A SUCCESSFUL CAMPAIGN

Our Campaign Champion's Guide meets you and your team where you are, whether that be 100% in-person, 100% virtual, or a hybrid of the two. We stand prepared with tools and resources to execute a successful campaign, with the underlying structure of **CONNECT, PLAN, INSPIRE, ASK, AND THANK!**

## STEP 1 CONNECT WITH US

We want to better understand your goals and how you would like to approach your campaign.

We also want to tell you more about our strategy for building stronger, more equitable communities!

- Call your United Way relationship manager to get started. If you don't know who your contact is, call us at **(585) 242-6400** or email **[contactus@unitedwayroclx.org](mailto:contactus@unitedwayroclx.org)**

## STEP 2 MAKE A PLAN

The keys to campaign success are **preparation and teamwork**. Having the right group of campaign volunteers will increase the success of your campaign and make your role much easier.

- Set fundraising and participation goals, objectives, and a timeline, and identify and recruit your team.
- Learn about various strategies to make your campaign fun and engaging.  
**Call us** - we have many options for in-person, virtual, or hybrid activities!

## STEP 3 INSPIRE CO-WORKERS

Tell people **how their dollars are making a difference**. Share stories about our neighbors who are struggling to make ends meet or those who have been impacted by racial inequities.

- Promote a culture of giving back. A successful campaign requires frequent communications and reminders.
- Engage coworkers in the campaign through virtual engagement and volunteerism, such as kit building and the ALICE experience.
- Share your own personal story about why you support United Way.
- Speakers are available upon request to present to you team. Connect with your relationship manager to learn more.

# STEP 4

## MAKE THE ASK

The number one reason people don't give is that they were never asked. Kick off your campaign with a **fun event featuring an energetic and inspiring ask** to give! We can help you do that virtually or in person.

- Create fun activities to drum up support and provide incentives for your colleagues to participate, such as earning an extra vacation day if you give in the first 24 hours, or purchasing raffle tickets to win a free lunch delivery or a subscription to Spotify. Get competitive while giving back!
- Have your company CEO write a letter or make a speech. CEO commitment and leadership help drive participation.
- Let's talk format. If peer-to-peer, in-person asks aren't an option, let us walk you through email/virtual best practices.

# STEP 5

## CONVEY GRATITUDE

**Review campaign results** with your United Way team.

- Share the impact! Publicize the campaign results in your company newsletter, intranet, social media channels, or a message from the CEO.
- Send individualized thank-you notes to each donor. Don't forget to say "Thank You!"

Let us help you thank your donors. Remember, we can't thank them if we don't know them!

Sharing data is encouraged!



# A ROADMAP TO IMPLEMENTATION

**Every campaign is different!** This checklist is a sample timeline to help plan and execute your United Way campaign. Campaigns can vary in length and be as short as one week. Your United Way relationship manager can help you right-size a timeline for your organization.



## PREPARE FOR YOUR CAMPAIGN

### STEP 1

#### Core Best Practice

- Schedule an in-person or Zoom meeting with your United Way relationship manager and any previous campaign team members to review successes and challenges from the previous year.
- Determine campaign dates, length, locations, and/or virtual options, plus fundraising and participation goals.
- Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities.

#### Bonus Best Practice

- Choose Leaders United members, employee resource group ambassadors, and union leaders.

### STEP 2

#### Core Best Practice

- Develop a campaign theme, calendar of events, and incentives, and recruit additional campaign committee members as necessary.
- Brief executive leadership on key objectives of your campaign and secure CEO buy-in.
- Talk to your United Way relationship manager about configuring an online giving platform.

#### Bonus Best Practice

- Develop Leaders United, employee resource group, and union engagement strategies by identifying donors and planning events.

### STEP 3

#### Core Best Practice

- Develop a communications plan.
- Order campaign materials (if in person).
- Visit the Campaign Toolkit online at [unitedwayrocflex.org/workplace-campaign](https://unitedwayrocflex.org/workplace-campaign) to check out campaign tools and templates, including virtual options.

#### Bonus Best Practice

- Develop a plan to host in-person or virtual volunteering or engagement activities. Learn more online at [unitedwayrocflex.galaxydigital.com](https://unitedwayrocflex.galaxydigital.com)

### STEP 4

#### Core Best Practice

- Train any campaign volunteers and ambassadors—we can assist.
- Build excitement! Share United Way impact stories and videos.
- Share calendar of events and incentives with all staff.

## KICK OFF YOUR CAMPAIGN

### Core Best Practice

- Host a fun and engaging kickoff event!
- Invite your CEO and United Way relationship manager to talk about United Way's impact.
- If virtual, use your company's preferred platform (Zoom, WebEx, Skype, etc.) or host on United Way's Zoom account (up to 300 participants).
- Length can vary. (Recommended ~30 minutes).

### Bonus Best Practice

- Record virtual or hybrid kickoffs for employees who have to miss it and share the video in smaller gatherings, on your internal employee site, and campaign welcome email.

## DURING YOUR CAMPAIGN

### Core Best Practice

- Track progress, and adjust strategies and incentives accordingly.
- Send online giving reminders (if applicable).
- Continue sharing United Way impact stories and engagement opportunities.

### Bonus Best Practice

- Host in-person or virtual events for Leaders United members, employee resource groups, or business units to create competition and increase participation.
- Host an in-person or virtual Day of Action or Care Project.

## CAMPAIGN WRAP UP

### Core Best Practice

- Conduct a close-out in-person staff rally or Zoom with your United Way representative and make sure to discuss year-round engagement opportunities.
- Share the final campaign fundraising total and don't forget to thank and show appreciation to employees!

