

**United  
Way**



**Lake Area United Way**



**DIGITAL**

**CAMPAIGN**

**GUIDE**



# STEPS TO A SUCCESSFUL CAMPAIGN

## PREPARE

- Set 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 team. A good ratio is one campaign team member per every 25 employees.
- Set a campaign goal that your campaign team and employees can rally behind.
- Set key points for distributing company-wide messaging, ie 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.

- 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.
- Utilize the campaign team members to keep the campaign top of mind on 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. Submit payroll deduction information to your HR or payroll processing department.
- Consider sending a thank you note to the entire company and a group of 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 – what does my donation do at various levels?

- \$1 a week provides 52 hungry people a hot, nutritious breakfast and lunch.
- \$5 a week provides 3.5 hours of legal services for a domestic violence survivor.
- \$10 a week provides 30 minutes of academic support to 6 at-risk students for an entire school year.
- \$20 a week provides dental services for 8 low-income patients.

## **A** ACCELERATE SUCCESS W/ 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.



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# BEST PRACTICES

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## KICKOFF:

- Record a video from a senior executive to be distributed electronically to all employees. United Way speakers and a campaign video are also available to talk about the impact of gifts made to Lake Area United Way.

## UTILIZE AVAILABLE RESOURCES:

- The Campaign toolkit is available online at [www.lakeareaunderway.org/campaign](http://www.lakeareaunderway.org/campaign) toolkit. This toolkit includes sample email messaging, fun ideas, pdfs of collateral materials and more.
- Lake Area United Way can guide you through all steps of running a digital campaign as well as help you goal set, train your team and more.
- Need something that is not available in the online tool kit? Ask us! Email Terry at [outreach@lakeareaunderway.org](mailto:outreach@lakeareaunderway.org)

## 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 make individuals 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 prizes include a day off with pay, 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.

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## EVENTS:

- 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 dress down days, potluck lunches, silent auctions and bake sales.

## RECOGNITION AND THANKS:

- Send thank you e-cards from your CEO, Campaign Chair, Campaign Co-Chair, Campaign Coordinator, 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.
- If possible, host an event for donors who give at a certain level.
- 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 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:** Lake 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 checks gifts. For more information, or a demonstration of the site, contact Lake Area United Way.

## Q: ARE DONATIONS TO UNITED WAY TAX DEDUCTIBLE?

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

## Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?

**A:** Most campaigns take place from July to November, 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: CAN EMPLOYEES DESIGNATE THEIR DONATION?

**A:** As a service to donors, we make it possible to specify a non-profit program to receive your donation. However, the direct investment of your dollars designated to Lake Area United Way goes further to strengthen education, financial stability, health and independence – the building blocks of opportunity – in our community.

# 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-seekers and trailblazers creating lasting change in Muskogee and Cherokee Counties.

You are a frontline volunteer who raises awareness about the vital role United Way plays in our community. Together with passionate supporters like you, we're leading the charge to improve education, financial stability, health and independence – the building blocks of opportunity for everyone in our community!

We hope this guide will provide you with the necessary resources to run your campaign virtually. Please reach out to Lake Area United Way if you require additional support and guidance throughout your campaign.

# LIVE UNITED

Put opportunity in the hands of everyone in our community.

