



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, 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.

- 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

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?

- \$5 per week could provide a safe place for a family to stay and plan for housing
- \$10 per week could mean preschool for a child to get them ready for kindergarten
- \$15 per week could mean 25 children receive dental exam and services
- \$25 per week could mean medical services and support for a veteran

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

KICKOFF:

- Record a video from a senior executive to be distributed electronically to all employees. Heartland United Way has some great testimonies posted on our website along with our tour of agencies.

UTILIZE AVAILABLE RESOURCES:

- The Workplace Campaign toolkit is available online at www.heartlandunitedway.org. This toolkit includes video links, materials and more.
- Your Heartland United Way team 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 Tiffany call us 308-382-2675 or email campaign@heartlandunitedway.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.

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.

EVENTS:

- Encourage employees to participate in virtual volunteer opportunities on their own, or as a company. Opportunities include writing encouraging notes to health care providers, teachers, or making videos of yourself reading books to be shared with local nonprofit agencies supporting children.

- The full list of opportunities available can be found at go2volunteer.org.
- 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.

Builders Club Levels:

- Based on the employees giving level, they can join the following Builders Club levels and take part in meaningful, year-round events, volunteer opportunities and engagement.
 - **Tocqueville** (\$10,000+)
 - **Leadership Circle** (\$5,000+)
 - **Pillar** (\$2,500+)
 - **Pioneer** (\$1,000+)
 - **Cornerstone** (\$750+)
 - **Foundation** (\$500+)

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: ARE DONATIONS TO UNITED WAY TAX DEDUCTIBLE?

A: Yes. For additional information, please visit heartlandunitedway.org

Q: WHEN SHOULD OUR GIVING CAMPAIGN RUN?

A: Most campaigns take place in the fall, 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, Heartland 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 nonprofit program to receive your donation. However, the direct investment of your dollars designated to the Heartland United Way goes further to strengthen education, income and health – the building blocks of opportunity in Hall, Hamilton, Howard and Merrick Counties.

Q: DO COMPANIES RECEIVE SPECIAL RECOGNITION FOR THEIR DONATIONS?

A: Yes, all companies are recognized on our website and in print materials. Some awards are given to companies that show exceptional leadership to their annual United Way campaigns. This includes creativity in implementation, 100% participation, total dollars pledged and more.

Q: WHO DECIDES WHERE THE DONATIONS GO?

A: Nonprofit programs submit formal requests for funding. A volunteer-led Allocations Committee conducts committee visits and assesses nonprofit programs. Programs also provide a presentation to the Allocations Committee. At the end of the process, the Committee recommends funding levels.

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!

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

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

Please call us with any questions you have! We are here to help!

308-382-2675



Lead **UNITED**

LIVE UNITED

Put opportunity in the hands of all in
Hall, Hamilton, Howard and Merrick Counties



Heartland United Way

HeartlandUnitedWay.org