



STEPS TO A SUCCESSFUL CAMPAIGN

Thanks so much for taking the role as the Employee Campaign Coordinator (ECC.) Not only are you providing a tremendous service to your company or organization, your efforts will also make a difference, improving lives and building stronger communities.

We've created this guide to help you implement a virtual campaign. These steps are designed to help you create a successful campaign. The United Way campaign team is also available to help you access tools and discuss the ideas in this guide. Contact us at campaign@tauw.org.

PREPARE

First step is to set campaign dates. Allow plenty of time to create strategic messaging and to get your pledge cards or ePledge portal set up. If you don't currently have online pledging and are interested, please contact us at datamanager@tauw.org.

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. Your TAUW staff can help.

Set key points for distributing company-wide messaging, such as announcing the campaign, kickoff, 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. See below for sample emails and timeline.

Run team challenges to encourage participation. Example: The team or business unit with the highest participation wins lunch delivered to their home or gift cards.

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.

MEETING INFO

Host a virtual education session (or use part of a team meeting) about the United Way. The staff is available and can ask a speaker from one of the partner agencies to join virtually. We also have several video options to choose.

WRAP UP

Finalize campaign results. Submit payroll deduction information to your HR or payroll processing department and send your donor lists and totals to pledgeprocessing@tauw.org or go online and complete the campaign report at www.tauw.org/campaignHQ

Consider sending a thank you note to the entire company and a group of donors.

Thank your campaign team. Celebrate your results!



MAKE IT SOCIAL

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SHORT AND SWEET

Digital campaigns are best when kept to 2 weeks or less. The longer the time, the less momentum.

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OVERALL GOALS

Clearly state your goals – dollars raised, number of participants, average donation.

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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. Check out www.tauw.org/campaignHQ for our selection.

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IMPACT

Provide impact statements – what does my donation do at various levels? See page 17 for impact statements you can distribute in an email.

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ACCELERATE SUCCESS WITH GAMES

Daily prizes, trivia, raffles, etc. are a great way to keep people connected. Consider having individual prizes for those teams who reach their goals.

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LIVE UPDATES ON GOAL PROGRESSION

Celebrate your wins! Keep momentum going by celebrating wins and keeping the progress of the campaign at the top of all communication.

BEST PRACTICES

KICKOFF

Invite employees to a virtual kickoff or record a video from a senior executive to distribute electronically to all employees. United Way and partner agency speakers are also available to join virtual kickoffs to share the impact of gifts made to Tulsa Area United Way.

UTILIZE AVAILABLE RESOURCES

The ECC guide and more are available online at www.tauw.org/CampaignHQ. These documents include sample email messaging, video links, pdfs of collateral materials and more.

Your United Way Account Manager can guide you through all steps of running a digital campaign as well as help you set goals, train your team and more. See page 19 for virtual campaign ideas.

Need something that is not available in the online tool kit? Ask your Account Manager! [Find who supports your campaign here.](#)

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 or video-to-video. Consider phone calls instead of emails to facilitate interpersonal communication.

INCENTIVES

Popular incentives and 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

To meet the needs of our community and prioritize safety, TAUW is hosting several Days of Caring. Visit www.tauw.org/DayOfCaring for more information.

The full list of volunteer opportunities available can be found at www.tauw.org/volunteer

Find opportunities to create virtual events: host a virtual kickoff for employees to hear from company and campaign leadership, have a virtual silent auction with prizes like gift cards, have a virtual day of impact, or host a virtual bingo game.

Check with your leadership team and review your company's policies on gatherings. If possible, consider having in person events once the campaign has launched to promote donation options and have a little fun.

AFFINITY GROUPS

United Way Affinity Groups are a way for employees to extend their impact and deepen their engagement with TAUW. Based on their giving level and personal interests, employees can join the following Affinity Groups and take part in meaningful, year-round events, volunteer opportunities and engagement.

- Emerging Leaders Society (\$250+)
- Women United (250+)
- Alexis de Tocqueville Society (\$10,000+)

To learn more about our Affinity Groups visit www.tauw.org.

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 or have a special thank you for donors who give at a certain level.

Publicize results and reiterate the impact of gifts via your company newsletter, email or intranet.

Finalize campaign results. Submit payroll deduction information to your HR or payroll processing department and send your donor lists and totals to pledgeprocessing@tauw.org or go online and complete the campaign report at www.tauw.org/campaignHQ