

# 10 Steps to a Successful United Way Campaign

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## Meet and Engage with your CEO

- Send out a personal letter of endorsement from your president or CEO
- Have your CEO be part of your kick-off (i.e. speech or participation in first pledge turn-in)
- Discuss corporate gift
- Discuss and/or develop your campaign budget

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## Recruit a Committee and Plan Your Campaign

- Set your campaign timeline (we recommend 10 days max)
- Discuss and/or develop your campaign budget
- Ask for employee volunteers to help. People who volunteer are usually involved because they want to be and will bring energy to the campaign
- Decide what your campaign activities will look like (presentations, activities, games, food, prizes)
- Ask your United Way representative to coordinate presentation speakers
- Assign committee tasks and establish target dates for completion

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## Review and Evaluate Past Performance and Calculate Goal

- Work with United Way representative to find out about your company's giving history
- Review last year's campaign and any feedback you received as to what worked and didn't work
- Incorporate new ideas for this year's campaign

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## Set Employee Goals

- Create a dollar goal
- Create a percent participation goal
- Allow employees to attend the United Way Agency Tour
- Give employees the opportunity to participate in the United Way Door-to-Door Drive

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## Publicize Your Campaign

- Share how to pledge, when to pledge and what your pledges support
- Use provided United Way materials (i.e. posters, videos, brochures, website, etc.)
- Send email communications to raise awareness about campaign activities and events
- Create a section on your company's intranet to share information about United Way and your company's campaign, linking it to United Way's website ([www.franklincountyuw.org](http://www.franklincountyuw.org))
- Use incentives to encourage giving

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## Conduct an Educational Campaign

- Invite United Way staff to present at a large group meeting (we call them rallies)
- Use a guest speaker from a United Way agency (UW can arrange)
- Conduct group presentations for all departments if large meetings are not an option (Remember United Way representatives are excited and available to attend all of your presentations)
- Ensure every employee receives United Way materials
- Follow up with employees to ensure every employee has been given the opportunity to contribute

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## Promote Leadership Giving

- Discuss with your CEO Leadership Giving matching opportunities
- Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO)

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## Ask Everyone to Give

- Ensure you ask every person to give by asking your committee and any other advocates to reach out to their co-workers (people say the number one reason they didn't give is because they weren't asked)
- Include everyone, both active employees and retirees
- Ask your new hires as part of the HR package
- Inform employees payroll deductions—"the painless way to give"

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## Report Results and say Thank You

- Recognize individuals, groups and departments that went "above and beyond" during the campaign
- Announce your final results to all employees through a communication from your CEO and/or conduct a finale activity
- Thank everyone at the time of giving—offer a thank you card or small gift from the company for their participation
- Make a "Thank You" display (hang posters, campaign activity photos and mementos of the campaign)
- Give a special thanks to your committee
- Collect all pledge cards, place them in your provided report envelope, complete the envelope and schedule a pick-up with your United Way representative

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## HAVE FUN!

- Engage your employees with creative activities that also educate about United Way
- Provide special pledge incentives, such as prizes for certain people such as first time donors, increased giving and/or other levels you feel appropriate to