



7 STEPS TO A SUCCESSFUL CAMPAIGN

STEP ONE: Plan, Plan, Plan

A. Evaluate Past Performance

- Participation percent, average pledge per employee
- Check with past coordinators for history
- Look for areas of opportunity to improve on previous year

B. Set Your Campaign Goal

- Employee pledge total, corporate gift, special events
- Be realistic

C. Meet With Top Management

- Review history and potential for pledge growth
- Share your plan with those who can lend special support
- Ask for support from the top

STEP TWO: Campaign Team

A. Recruit the Best Team

- Seek out enthusiastic volunteers who are respected by peers
- Use those who have United Way or agency involvement
- Be sure to have representation from various departments

B. Training and Team Role/Responsibilities

- Set individual responsibilities, assign tasks and activity leads
- Train the team (call on United Way staff!!!)
- Let management know who is on the team

C. Set Campaign Schedule

- Set a realistic schedule with dates and deadlines
- Decide type of campaign (one day, one week, multi-week, multi-month)
- Explore incentives for pledging or participation

STEP THREE: Educate

A. Promote and Publicize the United Way Mission Across your Organization

- Provide information 1-3 weeks ahead of asking for the pledge
- Posters, flyers, table tents, newsletters, electronic signs in break rooms, co-worker stories

B. Communicate Your Goal

- Let everyone know the goal you hope to reach (compare to last year)

C. Use United Way Resources

- Professional staff
- Speakers

STEP FOUR: Execution

A. Work the Plan!

- Have fun!!
- Be visible at the United Way Kickoff
- Plan a company-wide kickoff: from picnic for hundreds to a box of donuts for 5
- Personal presence and/or letter of endorsement from CEO, top managers and respected peers
- Keep presentations brief and to the point
- Maintain energy from start to finish of the campaign

B. Make the "Ask"

- Do not twist arms!
- Be sure everyone has an opportunity to participate in campaign
- Solicitations may be total group, small groups or individuals
- Special letters requesting support
- Use the campaign brochure
- Encourage leadership level (\$750+) giving

STEP FIVE: Report the Results

A. Share the Good News!

- Tabulate the results and report out regularly
- Thermometers or special in-house public measurement of percent-of-goal to let everyone know where the company stands

STEP SIX: Say Thanks!

A. Thank All Investors

- Potential personal letter from CEO/Manager recognizing their pledges and participation
- Thank you celebration (breakfast, lunch, reception)
- Announce final results

B. Thank Campaign Team and Volunteers

- Recognize all who made it happen behind the scenes
- CEO note or event for "the team" for going above-and-beyond

STEP SEVEN: Wrap Up

A. Planning for the Next Campaign

- Host a wrap up meeting to review your campaign
- Make notes of the good-bad-ugly
- Keep a copy of everything: minutes, flyers, letters, etc.
- Create a notebook/folder to be passed along to the next team
- Pat yourself on the back!!