

10 Steps to a Successful Campaign

1 EDUCATE YOURSELF ABOUT UNITED WAY

The more you know about United Way and running a campaign the more successful you will be promoting your campaign, communicating the mission of United Way, and leading your team.

- Know the facts about United Way of Tarrant County
- Attend the United Way Employee Campaign Manager training
- Meet with your United Way staff

2 SECURE EXECUTIVE OR TOP LEVEL SUPPORT

The success of your campaign depends on the commitment and involvement of your executive officer.

Ask your executive to:

- Review past campaign performance and set aggressive goals
- Approve a campaign budget
- Support a leadership giving campaign
- Approve a corporate match or a corporate contribution
- Send a communication to the employees endorsing the campaign
- Participate in campaign meetings and activities
- Approve incentives such as casual-dress day, extra days off with pay, etc.
- Allow company time for volunteer activities

3 RECRUIT AND TRAIN YOUR CAMPAIGN COMMITTEE

With your executive's support, select a team to help plan and run the campaign. The number of volunteers you recruit will vary based on the size of your organization.

- Include employees from different departments
- Consider involving management and Labor where appropriate
- Share best practices and steps for running a campaign
- Educate your committee about the United Way focus areas
- Define committee team roles

4 DEVELOP A CAMPAIGN PLAN

With the campaign committee, begin to lay out the campaign plan, logistics, and share the tasks so everyone is contributing to the campaign event and the workload is evenly distributed.

- Review your company's goal and giving history with your United Way staff
- Develop a campaign timeline
- Determine a campaign theme
- Determine the pledge process
- Choose special events that are tailored to your company culture
- Delegate responsibilities to committee members

5 PROMOTE AND PUBLICIZE YOUR CAMPAIGN

You and your committee can be creative in generating publicity and creating excitement and interest. You know your environment the best and what will be most effective for your culture.

- Invite United Way Speakers to employee meetings
- United Way video, brochures, banners, and posters
- Utilize company created materials
- Attend Agency tours
- Schedule Volunteer projects
- Visit the United Way website
- Communicate via E-mail, intranet, newsletter, etc.
- Goal chart

6 LEADERSHIP GIVING

Ask your CEO to appoint an executive who will lead the Leadership Giving Campaign and encourage the management team to participate.

- Appoint an executive to promote leadership giving
- Set a goal for leadership giving
- Ask CEO to make his/her pledge first
- Have the CEO open the meeting and announce the goal
- Invite a United Way Speaker to address the United Way impact areas
- Run your leadership campaign before your employee campaign
- Personalize the pledge forms
- Consider hosting a leadership breakfast, luncheon or late afternoon gathering
- Follow up with individuals who could not attend
- Announce results of Leadership Giving Campaign
- Recognize and thank leadership donors

7 KICK OFF THE CAMPAIGN

A Kickoff event is a very successful way to communicate a consistent message to your employees about the needs in the community and services United Way helps provide.

- Ask your executive to attend and publicly endorse the campaign
- Thank employees for last year's contributions
- Introduce the campaign committee
- Invite a United Way speaker and staff to the Kickoff
- Show the campaign video
- Make the meeting fun, highlight the theme with decorations, posters, etc
- Serve easy food items and refreshments
- Explain the campaign timeline and pledge process
- Announce any incentives for early pledging and deadline to turn in pledges
- Announce special fundraising events and volunteer days
- Have a drawing with prizes ...must be present to win
- Hold a Q & A
- Thank employees and celebrate campaign success
- Distribute pledge forms to every employee

8 MAKE THE ASK

Do you know why people don't give to United Way? Because they were never asked. Most people are generous and want to give, so ask them to donate and make it an easy process.

- Make your pledge first
- Personalize the pledge forms
- Explain the pledge process and completing the form
- Explain the ease of payroll deduction
- Advise other ways of giving through cash, check or credit card
- Mention the deadline for turning in pledges
- Have an incentive or drawing for early donors
- Keep the pledge process confidential
- Turn the pledge form in to key committee member, manager or Human Resources

9 WRAP-UP THE CAMPAIGN

Totaling the results and completing the report form is the final stage and wrap-up of your campaign. Ask your United Way staff any questions you may have about finalizing your report.

- Send employees reminders to pledge
- Announce the close of the campaign
- Complete the United Way Campaign Report Form
- Contact your United Way staff to collect all pledges
- Publicize final results to employees
- Thank everyone on the committee
- Thank all donors for their gifts with posters or banners
- Celebrate your campaign success with the employees
- Recognize leadership givers
- Issue a thank you letter from the CEO

10 PLAN FOR NEXT YEAR'S CAMPAIGN AND YEAR-ROUND AWARENESS

It is important to update your employees year round of how their dollars are helping in the community. Keeping employees engaged through volunteer opportunities year round gives them a sense of ownership in the community and builds morale.

- Solicit feedback from your committee and executive
- Identify next year's Employee Campaign Manager
- Work with your United Way staff to implement a community service program
- Work with your United Way staff to implement a United Way year-round communication plan to engage employees
- Plan for employees to volunteer in Days of Caring throughout the year
- Communicate about United Way's success throughout the year on company intranet or newsletter or E-mail links
- Invite United Way speakers to address groups year-round with updates and success stories