

10 Steps to a Successful Campaign

1

MEET AND ENGAGE WITH YOUR CEO

- Send out a personal letter of endorsement from your President or CEO
- Have your CEO be a 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

RECRUIT A COMMITTEE AND PLAN YOUR CAMPAIGN

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- Set your campaign timeline
- Discuss your campaign budget
- Ask for help. Keep in mind people who volunteer are involved because they want to be, and will lend energy to your campaign
- Decide what your campaign activities will look like (presentations, activities, food and prizes) Please ask your United Way contact to coordinate presentation speakers

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REVIEW AND EVALUATE PAST PERFORMANCE AND CALCULATE GOAL

- Work with United Way staff and find out about your company's giving history
- Review last year's campaign and any feedback you received as to what worked and what didn't work.
- Incorporate new ideas for this year's campaign (see campaign toolkit and be creative)

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SET EMPLOYEE GOALS

- Create a dollar goal and/or percent participation
- Have a volunteer project available for employees
(Please work with United Way contact to setup)

PUBLICIZE YOUR CAMPAIGN

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- Share how to pledge, when to pledge and what your pledges support
- Use provided United Way materials (i.e. posters, videos, brochures, 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.UnitedWayNWFL.org)
- Use incentives to encourage giving
- Order United Way T-Shirts

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CONDUCT AN EDUCATIONAL CAMPAIGN

- Invite UW staff to present at a large group meeting
- Use a guest speaker (UW can guide according to your organization's interest)
- Conduct group presentations for all departments if large meetings are not an option (Remember UW staff is excited and available to attend all of your presentations)
- Ensure every employee received UW materials
- Follow up with employees to ensure every employee has been given the opportunity to contribute



10 Steps to a Successful Campaign (continued)

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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)

ASK EVERYONE TO GIVE

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- Ensure you ask every person to give by asking your committee and any other advocates to reach out to their coworkers (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

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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 (consider offering a thank you card or small gift from the company for their participation)