

# 10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN



## BEST PRACTICES

### Step 1: Confirm CEO Support

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

### Step 2: Review Past Performance and Set Goal

Setting a goal for your company enables you to monitor and report results throughout the campaign.

### Step 3: Recruit a Winning Campaign Team

Your Campaign Committee will help you manage your organization's campaign and communicate with employees about United Way.

### Step 4: Develop a Plan for Success

A well-planned campaign sets the stage for success. Campaign timelines, scheduled events, and thoughtful incentives help the campaign team and your associates work toward your goal.

### Step 5: Promote and Publicize

Information and education are the keys to reaching your campaign goal.

### Step 6: Conduct Leadership Giving Campaign

Leadership giving is your company's greatest opportunity for campaign growth.

### Step 7: Make the Ask

The number one reason people do not give is because they were not asked. Give everyone the opportunity to make an educated, personal decision about giving to the United Way.

### Step 8: Report the Results

Employee follow-up and timely reporting of results is important for your donors and your organization.

### Step 9: Say "Thank you"

Wrap up a great campaign by thanking all those who helped you accomplish your goal.

### Step 10: Plan for Next Year's Campaign

Getting an early start to next year's campaign allows you the opportunity to execute an even more successful campaign for years to come.

- Ask your CEO to be a visible part of your organization's campaign by writing letters to your associates and attending campaign events.
- Consider using a targeted percentage increase or a per capita amount when setting your goal.
- Educate your committee about the United Way by holding a training session at the facility of a partner agency, allowing them to see first hand how dollars are spent and providing the tools and information needed to answer questions and concerns from your associates.
- Educate your associates by inviting them on tours with United Way partners. Ask those associates to report back to the larger group.
- Use incentive and prize dollars wisely to encourage new givers and increases in current pledges with "Step up" and First Time Giver incentive programs.
- Use "Fast Fact" e-mail messages to publicize your campaign and educate your associates about our community's issues and the results of United Way funded programs that are addressing those issues.
- Hold a special meeting for potential Leadership Givers using the facilities of a United Way partner agency.
- Hold departmental campaign meetings so that everyone may be addressed at once. Distribute pledge cards during the meeting and ask for them to be turned in at the end.
- Update associates frequently about progress toward your campaign goal by using company newsletters, bulletin boards and by posting "thermometers" in common areas.
- Celebrate your success with a fun event such as an ice cream party or catered lunch. Bonus: Ask upper management to do the serving!
- Hold a debriefing meeting with the Campaign Committee, CEO and your United Way representative to talk about opportunities for next year's campaign while they are still fresh on your mind.

Check out [WWW.UWPIEDMONT.ORG](http://WWW.UWPIEDMONT.ORG) for more Campaign Resources!

# FUN CAMPAIGN IDEAS

## INCENTIVES

Day off from work	Dinner for Two	Airline Tickets
1/2 day off from work	Hotel Getaways	Trophy for Department
Reserved Parking	Gift Certificates	w/ Highest Participation
Tickets to Games / Movies	Flowers Each Month for Year	Extra 1/2 hour for Lunch for a Week
Grocery Certificates	“Sleep-in” Passes	Time Share* (this could be donated by someone from your company)
Company T-shirts	“Leave Work Early” Passes	

## EVENTS

Casual Day	Cubicle/Office Decorating Contest	Ice Cream Social
Bake Sale	United Way Trivia Contest	Pizza Party
Softball / Volleyball Tournament	Chili Cook-off	Pancake Breakfast
Golf Tournament	Ugly Tie / Ugly Earring Contest	Beach Party
Executive Dunk Tank	Funniest Home Videos	Carnival
Silent Auction	Dress-up Day	Office Olympics
Management Service Auction	Departmental Penny Wars	Halloween Costume Contest
Auction Premier Parking Space	Flamingo Flocking	Baby Picture Guessing Game
Sell Popcorn and Drinks	E-mail Bingo	Children’s Drawing Contests
Luncheon Seminar	Raffles	Campaign Slogan /Theme Contest
Company Picnic/Employee Cookout	Stick It to the Man	Voice Mail / E-mail Quiz

## HOW TO CONDUCT A 30 MINUTE CAMPAIGN MEETING

Activity	Responsibility	Time
Welcome employees and give United Way endorsement	CEO	5 min.
Introduce and show the United Way video	Campaign Coordinator	5 min.
Have a guest speaker and /or testimonial	Community Agency	5 min.
United Way Representative Presentation	United Way Staff	5 min.
Distribute personalized pledge cards and other information	Campaign Coordinator	5 min.
Questions & Answers	United Way Staff	3 min.
Ask employees to fill out pledge cards and turn them in	Campaign Coordinator	2 min.
		30 minutes

## ONLINE CAMPAIGN RESOURCES

Complete Campaign Coordinator Guide  
 CEO Endorsement Letters to:

- All Associates
- Leadership Givers
- Retirees

CEO Thank You Letters

- Thanks to Committee
- Thanks to Associates

Incentive Request Letter  
 Campaign Team Recruitment Letter  
 Question & Answer Sheet  
 Fast Facts (E-mail Messages)  
 Success Stories  
 How Your Gift Improves Lives  
 Fun Campaign Ideas  
 “What If” Analysis (for Goal Setting)  
 Pledge Cards

- Associate Pledge Card
- Leadership Pledge Card
- Spanish Version
- Donor Choice Card

Campaign Meeting Presentation Template  
 United Way Logo  
 And More!

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