



Top 10 Steps to Success: Conducting a Quality Campaign

Please review and mark: C=Continue Doing I=Improve A=Add this year

10. Get the Support of Your CEO

- Gain support from your Top Management—both actively and visibly during your campaign.
- Send out a personal letter of endorsement from your president or CEO.
- Discuss and/or develop your campaign budget.
- Set your campaign goal.

9. Recruit a Committee

- Establish your committee by recruiting from all facets and levels throughout your organization. Remember this is your “action team”. People who volunteer are involved because they want to be, and will lend “energy” to your campaign.
- Gain assistance from your United Way representative by inviting them to your meetings to help train your committee and plan activities.

8. Review and Evaluate

- Review last year’s campaign and any feedback you received as to what worked and didn’t work.
- Determine if you have any employees who should be included in this year’s campaign that may not have been included in previous years.
- Review this year’s campaign budget.

7. Set Employee Goals

- Establish a timeline for your campaign.
- Plan your presentations, events, kickoff, activities, food, and prizes.
- Assign committee tasks and establish target dates for completion.
- Decide strategies that you would like to improve and design activities to do so.

6. Publicize your Campaign

- Create and use posters, videos and/or brochures.
- Send email communications, or any type of internal communication that your company utilizes to raise awareness about campaign activities and events.
- Sign your workplace up for a volunteer event.
- Create a section on your company’s intranet to share information about United Way and your own campaign: link it to United Way’s website (www.tuw.org).
- Share how to pledge, when to pledge and what your pledges support.



5. Conduct an Educational Campaign

- _____ Develop an educational plan on how to educate your employees on the benefits of giving back to the community through United Way.
- _____ Conduct group presentations for various departments within your organization.
- _____ Educate your new hires, ongoing, throughout the year.
- _____ Inform retirees about the many ways they can continue to GIVE, ADVOCATE and VOLUNTEER when they leave the workplace

4. Promote Leadership Giving

- _____ A *Leadership Giving* campaign is an effective strategy to increase contributions raised by your organization.
- _____ Contact your CEO about *Leadership Giving* matching opportunities.

3. Ask Everyone to Give

- _____ Include everyone! Make it a point to ask every person to give. Utilize a committee and any other advocates to reach out to their co-workers.
- _____ Out of site, but not mind! Focus on both active employees and retirees! They gave when they were actively working, many want to continue that support into retirement!
- _____ Thank everyone at the time of giving—offer a thank you card or small gift from the company for their participation.

2. Thank You and Report Results

- _____ 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, or conduct a finale activity.
- _____ If using paper pledge, collect all pledge cards by the end of the campaign and schedule a pick-up with your United Way representative as soon as possible. The earlier you turn in your organization’s pledges the faster you can complete your campaign.

1. HAVE FUN!

- _____ Arrange fun and educational activities to engage your employees and have fun learning about United Way.
- _____ Provide special pledge incentives, such as, prizes for certain levels of giving or participation.
- _____ This is an opportunity for all levels of employees to work together towards advancing the common good in our community.



Organization: _____

Campaign Coordinator(s): _____

UW Staff Support: _____

Critical Campaign Elements Plan

Identify the top 3 elements to work on IMPROVING this year

1. _____

2. _____

3. _____

Identify the top 3 elements to ADD this year

1. _____

2. _____

3. _____