

8 Steps to a Successful Campaign

1. Get Started

- Meet your United Way staff person.
- Visit a United Way agency.
- Review United Way materials.

2. Know Your Organization

Knowing your organization's United Way history gives you a place to begin.

- Talk to last year's Employee Campaign Coordinator (ECC). Find out what worked and what didn't work in your organization.
- Work with your CEO to set an aggressive campaign goal based on the number of employees you have and last year's campaign performance.

3. Enlist Support

This job is much easier and more fun when you have some help.

- Your CEO's enthusiasm can be contagious. Ask him or her to write a personal letter of support to all employees.
- Recruit a committee representing all of the departments in your organization.
- Ask your CEO to appoint next year's Employee Campaign Coordinator (ECC) to work with you.

4. Decide on Solicitation Style

Decide on the best method of approaching fellow employees—group, individual or both.

- *Group Solicitation* : Employees are brought together to hear the United Way message and are then asked to fill out their pledge cards at the end of the presentation. Group solicitation allows for the best use of time and, because employees hear a uniform message, less follow-up is required.
- *Individual Solicitation* : This is a one-on-one ask for an employee to make a gift. This style involves more employees but personalizes the campaign and affords you a greater opportunity to answer individual questions.
- *Both* : Hold one group meeting or a series of group meetings and use the one-on-one solicitation as a means of follow-up for those who couldn't attend a group session.
- Emphasize leadership giving (for personal gifts of \$1,000 or more): Hold a separate group meeting for all management and professional employees to be asked prior to the employee campaign to set the pace. If this is your first campaign, ask your United Way staff person for some extra assistance with this group meeting.

5. Promote Your Campaign

By promoting your campaign, you will be encouraging others to get involved.

- Use United Way brochures, posters and thermometers to build awareness of the upcoming campaign. United Way provides these at no cost to your organization.
- Promote and publicize your campaign in employee newsletters, e-mail and other in-house communication tools.
- Increase employee awareness by creating competition between departments. Prizes and incentives can also create interest.
- Order items from the United Way catalog—pens, t-shirts, etc. depending on your budget.
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Themes:

The Best Way to Help the Most People

- Join the Winning Team
- Be a Winner . . . Give to United Way
- Be a Part of the Winning Team . . .
Give to United Way
- Make Our Community a Winner . . .
Give to United Way
- Working Together We Make a
Winning Team
- Help United Way Win in Our
Community

Incentives:

- Time Off From Work
- Casual Day
- Reserved/Covered Parking
- Tickets to Games/Movies
- Grocery Certificates
- Company T-Shirts
- Dinner for Two
- Hotel Getaways
- Gift Certificates
- Flowers Each Month for a Year
- “Sleep-in” Passes
- “Leave Work Early” passes
- Airline Tickets
- Trophy for Department with Highest
Participation
- Extra Half Hour for Lunch for a Week

Fun Events:

Casual Day — Softball/Volleyball Tournament — Golf Tournament — Bake Sale — Executive
Dunk Tank — Silent Auction — Management Services Auction — Auction premier parking space
— Sell popcorn and drinks — Invite agency speaker to speak during lunch — Company
Picnic/Employee Cookout — Ice Cream Social — Pizza Party — Pancake Breakfast — Beach
Party — Carnival — Office Olympics — Halloween Costume Contest — Baby Picture Guessing
Game — Children’s Drawing Contests — Campaign Slogan/Theme Contest — Voice Mail/e-mail
Quiz — Cubicle Decorating Contest — United Way trivia contest — Male beauty contest — Chili
cook-off — Ugly tie/ugly earring contest — Funniest home videos — Dress-up day —
Departmental Penny Wars —

Tips for Solicitation

How Should I Use Incentives?

The number of ways an incentive can be used is limitless. The important thing is to use incentives as a tool to increase participation or increase the average gift of your employees. What works in one company may not work in yours, so do whatever works for you.

Strategies to Increase Participation

- Hold a drawing at the end of each employee meeting for **all** who turn in a pledge card.
- Give everyone who turns in a pledge card a ticket. When the campaign is complete, have a drawing for incentives.
- If you make the company goal, throw a party.
- Hold a drawing for all employees who go on a tour of a United Way agency.

Strategies to Increase the Average Gift

Give the employees extra time off for increasing their gift by 10%.

- Hold a leadership giving campaign.
- Establish a company leadership level and recognize accordingly.
- Use “What Your Dollars Can Do” information.
- Stress the ease of payroll deduction.
- Ask employees to give \$1 more a week.

At United Way . . . Every Dollar Counts

6. Educate

United Way has many resources available to help you run an effective campaign. Campaign videos, speakers and agency tours are excellent ways to show how United Way dollars are working in our community and can enhance the effectiveness of your campaign meetings. These all help “ask” for you.

Videos : United Way’s campaign video is available and is a great addition to your meeting. The video is produced locally and highlights people living in our community who have benefited from United Way services. Order the video with your campaign supplies.

Speakers : Agency representatives, United Way and/or agency volunteers, volunteer labor representatives, or clients who have received services from a United Way agency are all available to speak at your organization and are eager to share their stories. A five-minute presentation by one of these speakers will personalize your employee meeting.

Tours : Motivate employees to give by providing a firsthand look at how contributions make a difference in our community. Tours of United Way agencies significantly impact the results of an employee campaign. Tours usually last about 30 minutes plus travel time per agency and can be arranged to accommodate your employees’ schedules. Most groups want to visit two or three agencies.

- Order Video
- Book Speaker
- Book Tour

Don’t let things pile up!

Book your speakers and tours early.

7. Implement a Campaign Plan

- Schedule a short, intensive campaign. A two-week campaign has proven to be the most effective. Short campaigns keep the momentum and enthusiasm high.
- Make a gift yourself. It is easier to ask others to give when you are giving.
- Use personalized pledge cards to make sure everyone has an opportunity to contribute. Get help from data processing and department heads.
- Conduct an employee kickoff celebration.
- Use the United Way campaign video in your meetings to make employees aware of the services provided locally.

Make sure every employee is asked to give. Don't forget employees who work off-site, travel extensively, or are on alternate shifts.

8. Report Results

It is very important to report your results to United Way as soon as possible following the completion of your campaign. Call your [Loaned Executive](#) or United Way at 215-949-1660 ext 114 if you have any questions.

- Make sure all pledge cards are returned and accounted for. **Turn all payroll deduction cards in to your payroll office.**
- Summarize all campaign information on the Report Envelope. Enclose cash, checks and copies of all pledge cards and designation forms.
- Complete the yellow Leaders Report Form for all individuals who pledge \$1,000 or more. Be sure to include it in the Report Envelope.
- Call your Loaned Executive or United Way to pick up your Report Envelope.
- Report final results to your fellow employees and thank them for participating.

YOU'RE DONE!