Your Campaign Plan for Success

United Way of the Mid-South

Organization: _____ Chief Executive: _____

Chief Executive

Last Year / This Year

- ◯◯ Increases the corporate gift
- ◯◯ Appoints a senior-level executive as Employee Campaign Chairman (ECC)
- ◯◯ Appoints a senior-level executive as Leadership Gifts Chairman (LGC)
- ◯◯ Authorizes an Employee Campaign Committee
- ◯◯ Authorizes payroll deduction and authorizes continuous giving
- ◯◯ Sends endorsement letter to employees
- ◯◯ Speaks at employee meetings
- ◯◯ Approves and supports a campaign goal
- ◯◯ Makes a personal leadership gift
- ◯◯ Agrees to a CAN-DO* for the organization
- ◯◯ Approves company time for:
  - ◯◯ Committee meetings ◯◯ Agency tours
  - ◯◯ Solicitor training ◯◯ Employee meetings
- ◯◯ Meets with Union leadership (if applicable) to secure their support for the campaign

Employee Campaign Chairman

Last Year / This Year

- ◯◯ Attends Campaign Leaders Training
- ◯◯ Appoints a capable and enthusiastic Employee Campaign Manager (ECM)
- ◯◯ Appoints a capable and effective Campaign Communications Chairman
- ◯◯ Works with the Leadership Gifts Chairman and Union leadership
- ◯◯ Makes a personal Leadership Gift
- ◯◯ Speaks at employee meetings and campaign events
- ◯◯ Leads the Employee Campaign Committee in analysis of past performance
- ◯◯ Reviews/approves goal recommendations and Campaign Plan

Leadership Gifts Chairman

Last Year / This Year

- ◯◯ Attends United Way Campaign Leaders Training
- ◯◯ Identifies potential Leadership Givers and solicits executive staff
- ◯◯ Determines method of solicitation:
  - ◯◯ One-on-One ◯◯ Group ◯◯ Combination
- ◯◯ Sets goal for leadership gifts
- ◯◯ Provides recognition for gift level achievements

Employee Campaign Manager

Last Year / This Year

- ◯◯ Attends United Way Campaign Leaders Training
- ◯◯ Organizes and leads Employee Campaign Committee
- ◯◯ Develops campaign timetable
- ◯◯ Determines method of solicitation:
  - ◯◯ One-on-One ◯◯ Group ◯◯ Combination
- ◯◯ Arranges Solicitor Training
- ◯◯ Arranges employee meetings
- ◯◯ Reports results to United Way weekly, including payroll deduction forms, cash, checks, designations and Leadership Givers information

Campaign Communications Chairman

Last Year / This Year

- ◯◯ Recommends effective campaign communications strategies tailored to the organization
- ◯◯ Works to identify employees of the organization who have received United Way services and are willing to share their stories
- ◯◯ Develops campaign publicity and events
- ◯◯ Utilizes company publications to educate, publicize and promote campaign progress
- ◯◯ Plans tours, speakers, promotions, events and recognition

Campaign Pledge Report Manager

Last Year / This Year

- ◯◯ Schedules, prepares and organizes weekly reports to United Way including:
  - Payroll deduction pledges by donor, amount and totals
  - Designations and leadership gifts
  - Payment schedules
  - Cash, checks, direct billings, credit cards, stocks or "other"

Employee Campaign Committee

Last Year / This Year

- ◯◯ Attends United Way Campaign Leaders Training
- ◯◯ Recommends improvements after analyzing past campaigns for strengths and weaknesses
- ◯◯ Determines campaign potential, percent of potential achieved last year and establishes goal
- ◯◯ Identifies solicitors (one to every fifteen employees)
- ◯◯ Develops departmental competition
- ◯◯ Develops incentives
- ◯◯ Develops special events throughout the year to supplement the campaign
- ◯◯ Ensures "new-hires" receive information and are asked to give
- ◯◯ Develops a campaign among retirees

I / we agree to implement the above items in our United Way campaign.

Signed:_____

Date: _____

Five steps to find your Giving Potential!

1 Find your *Total Potential* using one of two formulas:

_____ **X** .01 **=** _____

Total payroll — *Your organization's Total Potential*

or

_____ **X** .01 **X** _____

Average annual wage — Number of employees

= _____

Your organization's Total Potential

2 Last year's amount raised:

_____

3 Percent of total potential achieved:

_____%

4 This year's goal:

_____

5 Percent of potential goal:

_____%

**** CAN-DO = Campaign Analysis Now - Developing Objectives*** is an intensive half day campaign evaluation, problem solving and program development process. Recommended participants include current and past Employee Campaign Managers, Leadership Gifts Chairmen and representatives from senior management, labor and key employee departments.