

10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN

1

MEET AND ENGAGE THE CEO

- Send out a personal letter of endorsement from your president or CEO.
- Have your CEO participate in kick-off. (i.e. speech or participation in first pledge turn-in).
- Discuss corporate gift.
- Discuss and/or develop your campaign budget (free incentives do exist if necessary!).

2

RECRUIT A COMMITTEE AND PLAN YOUR CAMPAIGN

- Set your campaign timeline (2-4 weeks is ideal).
- Discuss and/or develop 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 staff member to coordinate presentation speakers.
- Assign committee tasks and establish target dates for completion.

3

REVIEW AND EVALUATE PAST PERFORMANCE AND CALCULATE GOAL

- Work with your United Way staff person and find out about your company's giving history (3 year history is available for your organization from United Way contact).
- Review last year's campaign and any feedback you received as success and opportunities for growth.
- Incorporate new ideas for this year's campaign and be creative.

4

SET EMPLOYEE GOALS

- Create a dollar goal.
- Create a percent participation goal.
- Have a volunteer project available for employees. (Please work with United Way staff members to create your optimal activity).

5

PROMOTE & PUBLICIZE YOUR CAMPAIGN

- Share how to pledge, when to pledge and what your pledges support (request impact of your dollars).
- Use provided United Way materials (i.e. posters, videos, brochures, online).
- 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.uwmidsouth.org).
- Provide incentive(s) to encourage giving.
- Order United Way T-shirts for committees.

6

CONDUCT AN EDUCATIONAL & INFORMATIVE CAMPAIGN

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



PROMOTE LEADERSHIP GIVING

- A. Discuss Leadership Giving (\$500+) matching opportunities.
- B. 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

- A. Ensure you ask every person to give by asking your committee and any other advocates to reach out to their co-workers (people say the number one reason they didn't give is because they weren't asked).
- B. Include everyone, both active employees and retirees.
- C. Ask your new hires as part of the onboarding process.
- D. Inform employees of the ways they can continue to Give, Advocate and Volunteer.



REPORT RESULTS AND SAY THANK YOU

- A. Recognize individuals, groups and departments that went "above and beyond" during the campaign.
- B. Announce your final results to all employees through a communication from your CEO and/or conduct a finale activity.
- C. Thank everyone at the time of giving – offer thank you cards or a small gift from the company for their participation (templates available online).
- D. Make a "Thank You" display (hang posters, campaign activity photos and mementos of the campaign).
- E. Give special thanks to your committee (hold a special coffee break where every one receives a United Way mug and a special thank you from you and the CEO).
- F. Collect all pledge cards, place them in your provided report envelope, complete the envelope and schedule a pick-up with your United Way representative.



HAVE FUN!

- A. Engage your employees with activities that educate about United Way.
- B. Provide special pledge incentives or prizes for people that are first time donors, have increased giving and/or other levels you feel appropriate to award.
- C. Volunteer together.



of the Mid-South

901.433.4300 | 1005 Tillman Street | Memphis, TN 38112

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