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

2. **RECRUIT A COMMITTEE AND PLAN YOUR CAMPAIGN**
   - A. Set your campaign timeline (2-4 weeks is ideal).
   - B. Discuss and/or develop your campaign budget.
   - C. Ask for help, keep in mind people who volunteer are involved because they want to be, and will lend energy to your campaign.
   - D. Decide what your campaign activities will look like (presentations, activities, food and prizes). Please ask your United Way staff member to coordinate presentation speakers.
   - E. Assign committee tasks and establish target dates for completion.

3. **REVIEW AND EVALUATE PAST PERFORMANCE AND CALCULATE GOAL**
   - A. 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).
   - B. Review last year’s campaign and any feedback you received as success and opportunities for growth.
   - C. Incorporate new ideas for this year’s campaign and be creative.

4. **SET EMPLOYEE GOALS**
   - A. Create a dollar goal.
   - B. Create a percent participation goal.
   - C. Have a volunteer project available for employees. (Please work with United Way staff members to create your optimal activity).

5. **PROMOTE & PUBLICIZE YOUR CAMPAIGN**
   - A. Share how to pledge, when to pledge and what your pledges support (request impact of your dollars).
   - B. Use provided United Way materials (i.e. posters, videos, brochures, online).
   - C. Send email communications to raise awareness about campaign activities and events.
   - D. 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).
   - E. Provide incentive(s) to encourage giving.
   - F. Order United Way T-shirts for committees.

6. **CONDUCT AN EDUCATIONAL & INFORMATIVE CAMPAIGN**
   - A. Invite United Way staff to present at a large group meeting.
   - B. Use a guest speaker (United Way can guide according to your philanthropy).
   - C. 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).
   - D. Ensure every employee receives United Way materials.
   - E. Follow up with employees to ensure every employee has been given the opportunity to contribute.
7. 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).

8. 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.

9. 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.

10. 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.

WHERE THERE’S A YOU, THERE’S A WAY!

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