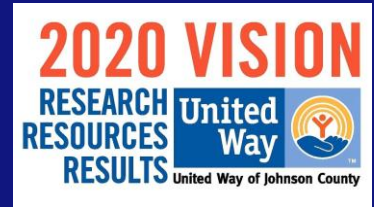


# 10 Keys to a Successful Campaign



Each United Way campaign is unique but these ten steps are the building blocks to an effective campaign.

## 1. Get Connected

- Contact your United Way representative (United Way staff or Loaned Executive) to learn how we can assist you
- Attend the annual Employee Campaign Coordinator training in August
- Visit us online for campaign tools and ideas

## 2. Obtain Support from CEO/Senior Leadership

- Talk to your company's leadership about approving a campaign committee and budget and allowing use of company time for meetings and activities
- Request personal involvement from leadership
  - Ask leadership to publicly support, endorse and participate in the campaign and events
- Discuss the possibility of the business matching a percentage of employee gifts with a corporate contribution
- Discuss how the 2020 Vision Goals for the Common Good fit with your company's values and corporate responsibility
- Suggest getting your business involved in the United Way Workplace Volunteer Program. Get approval for employees to volunteer for service to the community
- Develop a strategy for engaging other company leaders, possibly through a separate leadership campaign

## 3. Recruit a Strong Campaign Committee

- Build a campaign team that involves individuals from each department and level within the organization
- Invite your United Way representative to your planning meetings to answer questions and offer ideas

## 4. Develop Your Campaign Plan

- Set your campaign timeline (most campaigns are for one to two weeks)
- Set a goal. With the help from your United Way representative, identify areas for improvement and set measurable goals to achieve them
- Identify campaign responsibilities with committee members and assign responsibilities for them
- Solicit other incentives to help encourage new donors to participate and existing donors to increase their giving
- Choose campaign strategies that fit your company culture



## Schools

### 5. Promote and Prepare

- Promote the campaign with United Way posters, banners and flyers
- Include campaign communications in company newsletters, daily emails, departmental and staff meetings
- Ask CEO/Senior Leadership to write a company-wide letter in support of the campaign
- Work with your United Way representative to get necessary campaign materials (pledge forms, posters, etc.)

### 6. Campaign Kick-off

- Invite all staff to a kick-off event that communicates management support, campaign goals supporting the 2020 Vision and a schedule of planned activities (if any)
- Make your personal gift to United Way before the start of the campaign
- Schedule your United Way representative to speak at kick-off and departmental meetings

### 7. Make the Ask

The number one reason why people say they didn't give to their workplace campaign is because they weren't asked!

- Make sure that everyone is asked to give at kick-off, departmental meetings and through one-on-one conversations
- Have the committee personally distribute the pledge forms and ask co-workers to join them in support of the United Way
- Make sure they know the importance that their gift makes to the community
- Express your gratitude by thanking them!
- Employees who choose not to donate, thank them anyway for considering the United Way

### 8. Monitor and Report Your Progress

- Keep a running total as the pledge cards are collected. Compare against goals identified by your campaign committee
- Provide regular progress updates to employees
- Hold a mid-campaign committee meeting to review progress towards your goal. Identify any additional strategies to entice participation
- Make personal follow-ups to thank donors and employees who have not yet turned in their pledge cards



## Rockwell Collins

## P&G's Oral B

### 9. Campaign Wrap-up

- Collect all pledge forms and donations
- Schedule a meeting with your United Way representative to complete all required paperwork and to turn in pledge forms and donations
- Hold an event to report the final campaign total
- Thank everyone! Send emails and hang posters of appreciation! Ask the CEO to send a note of thanks to employees
- Hold a final campaign committee meeting to evaluate efforts

### 10. Year Round Engagement

- Share United Way updates and news with employees year-round so that they can feel the impact of their contributions
- To further engage employees, arrange a volunteer project through the Workplace Volunteer Program
- Hold a brown-bag seminar and invite your United Way representative to come and speak
- Have new hire and retiree packets to introduce new employees to United Way and to allow retirees to continue their engagement

We realize that this is additional work for you on top of your regular responsibilities. We are very appreciative! We are here to provide whatever support you need, not just during your campaign, but throughout the entire year!

**THANK YOU FOR YOUR LEADERSHIP!**

Stay connected with the community!



[www.unitedwayjc.org](http://www.unitedwayjc.org)

[www.twitter.com/uwjc](https://www.twitter.com/uwjc)

[www.facebook.com/unitedwayofjohnsoncounty](https://www.facebook.com/unitedwayofjohnsoncounty)