

10 Steps to a Successful United Way Campaign!

Congratulations on being selected as your company's Employee Campaign Manager. Not only are you providing a tremendous service to your company, but your efforts will also make a difference - improving lives and building a stronger community. Santa Cruz County County United Way staff are ready to assist however possible. Please visit the Campaign Tools page on www.unitedwaysc.org or simply call 831-465-2205. We look forward to working together and the success it will bring.

- 1 Meet and Engage with your CEO**
- Send out a personal letter of endorsement from your president or CEO
 - Have your CEO be a part of your 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 (ten days max)
 - Discuss and/or develop your campaign budget (free incentives do exist if necessary!)
 - 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 United Way staff person and find out about your company's giving history(5 year history is available for your organization from UW contact)
 - Review last year's campaign and any feedback you received as to what worked and didn't work
 - Incorporate new ideas for this year's campaign (see coordinator toolkit 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 member to create your optimal activity)

- 5 Publicize your Campaign**
- Share how to pledge, when to pledge and what your pledges support
 - 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.unitedwayspokane.org).
 - Incentive to encourage giving
 - Order United Way T-shirts for employees

- 6 Conduct an Educational Campaign**
- Invite United Way staff to present at a large group meeting
 - Use a guest speaker (UW 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

- 7 Promote Leadership Giving**
- Discuss with your CEO Leadership Giving matching opportunities
 - 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**
- 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)
 - Include everyone, both active employees and retirees
 - Ask your new hires as part of the HR package
 - Inform employees of the ways they can continue to Give, Advocate and Volunteer

- 9 Report Results and say Thank You**
- Recognize individuals, groups and departments that went "above and beyond" during the campaign
 - Announce your final results to all employees through a communication from your CEO and / or conduct a finale activity
 - Thank everyone at the time of giving—offer a thank you card or small gift from the company for their participation (templates available online)
 - Make a "Thank You" display (hang posters, campaign activity photos and mementos of the campaign)
 - Give special thanks to your committee (hold a special coffee break which everyone receives a United Way mug and a special thank you from you and the CEO)
 - 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!**
- Engage your employees with creative activities that also educate about United Way
 - Provide special pledge incentives, such as prizes for certain people such as first time donors, increased giving and/or other levels you feel appropriate to award.
 - Volunteer together (www.unitedwaysc.org)

Thank you for your hard work!

GIVE. ADVOCATE. VOLUNTEER.

