Steps to a Successful United Way Campaign!

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.