

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!

Together, we are United 4 Youth