

8 STEPS FOR LEADING AN EFFECTIVE CAMPAIGN



1. INVOLVE TOP MANAGEMENT

Confirm support of top management and keep them engaged. If your CEO endorses the campaign, employees are more likely to participate.

- **Meet** with your CEO to discuss the objective of the campaign, employee goals, and possible donor incentives.
- **Ask** your CEO to allow time for training, group meetings and agency tours.
- **Ask** your CEO to endorse the campaign through personal letters and/or emails, and to attend the kick-off.
- **Ask** your CEO to determine the amount of your corporate contribution.



2. BUILD YOUR TEAM. RECRUIT HELP.

Successful campaigns are the result of a varied and inclusive team. Be sure to include representatives from many levels of management, line staff and departments.

- **Form** a campaign committee to spread enthusiasm and the workload.
- **Attend** an Employee Campaign Coordinator Workshop & the Campaign Kick-Off Event.
- **Tour** a United Way of Marion County agency to see first-hand how your donation helps people in need. Coordinate tours through United Way.
- **Meet** with a United Way representative or volunteer to make sure you have all the tools you need to start your campaign.



3. DEVELOP A GOAL AND/OR THEME.

Goals and themes can help motivate employees and build morale.

- **Look** at past results, keeping in mind:
 - The number of contributors
 - The total amount raised
 - The participation rate
 - Average employee gift
- **Based** on what you find, consider setting realistic and challenging goals.
- **Set** a specific time frame for the start and finish of your campaign.



4. DEVELOP LEADERSHIP GIVING

Individuals who give \$1,000+ are considered Leadership Givers. Commitment from top leaders will motivate the rest of the organization to get involved

- **Review** prior year's results and identify current leadership donors and prospective donors.
- **Conduct** a separate leadership meeting with your CEO and senior management.
- **Peer-to-peer** solicitation is key in leadership giving. Ask your CEO to appoint an executive who will solicit members of the management team for leadership gifts.
- **Provide** United Way with proper spelling of names, job titles, and investment amounts for each leadership donor. This will ensure proper recognition of their generosity.
- **Send** thank you notes to each leadership donor.
- **Ask** your CEO to host a reception to acknowledge leadership donor.

QUICK TIP!

Research tells us that **people give more often when someone has personally asked them to contribute**, either in a group setting or one-on-one. Employees do not feel asked if the pledge card is slipped into their inbox (and therefore will probably not give).



5. PROMOTE AND PUBLICIZE

Sharing information about United Way is critical in reaching your campaign goals.

- **Use** your in-house newsletter or other form of company communication to promote the campaign.
- **Display** United Way posters and materials throughout the building.
- **Use** the posters to communicate key dates.
- **Use** voicemail, e-mail and/or other media to educate employees about United Way and to share the progress of the campaign.
- **Call** your United Way of Marion County campaign contact to request promotional material.



6. LAUNCH YOUR CAMPAIGN

Inform, engage, ask and thank.

- **Have** a kick-off event and small group/branch/department meeting(s) to share campaign details.
- **Include** the president/CEO, a United Way representative and/or agency speaker, and/or a company employee with his or her own United Way story.
- **Share** United Way educational materials and pledge forms.
- **Show** the United Way video.

SAMPLE KICK-OFF MEETING AGENDA

- **WELCOME AND ENDORSEMENT**, as well as thank employees for last year's participation: CEO -- *2 minutes*
- **OVERVIEW OF CAMPAIGN:** Employee Campaign Coordinator -- *2 minutes*
- **TESTIMONIAL:** Employee, partner agency representative and/or United Way video -- *5 minutes*
- **MAKING THE CASE** for giving to United Way. Remind employees of the impact United Way has on the community: United Way staff representative or volunteer -- *4 minutes*
- **DISCUSS COMPANY GOALS** and solicitation: Employee Campaign Coordinator -- *5 minutes*
- **CLOSING, COLLECT FORMS:** Employee Campaign Coordinator -- *2 minutes*

TOTAL: 20 minutes



7. WRAP UP AND REPORT RESULTS

You've done an outstanding job! It's time to wrap things up. Here are things to keep in mind as your campaign comes to a close.

- **Share** campaign updates and results with employees.
- **Collect** all pledge cards.
 - **Make sure you make a copy of the pledge cards you receive and give to United Way. Give the original form to payroll department.**
 - Make sure each donor has signed his/her pledge card.
- **Complete** Report Envelope and inserts
 - Record all givers and amounts on the pledge listing sheets. Take note of those who gave \$500 or more (Winner Circle and Leadership Givers).
 - If someone designates his/her gift, please indicate that on the appropriate form.
 - On the envelope, please note the total number of donors to date and the total number of dollars raised.
- **Contact** your United Way representative or volunteer to pick up the report envelope or drop it by the United Way office.



8. THANK EVERYONE AND CELEBRATE

Thank everyone who worked on the campaign and invested in United Way.

- **Report** final results through company intranet or email messages.
- **Thank** your campaign committee and CEO.
- **Recognize** employees and departments that had great results in contributions, participation and/or increase in average gift.
- **Share** with employees the difference their gifts make (stories, results from funded programs, etc.). It's important that each individual employee feels our gratitude.
- **Have a thank you reception.**