

8 Steps to a Successful Workplace Campaign

We invite you to incorporate as many of these best practices as possible in your workplace campaign. Following these “8 Steps” will help you have a greater chance of achieving your campaign goals!

1. Plan, Plan, Plan!

Believe it or not, 80 percent of the time it takes to run a successful campaign is planning—only 10 percent is spent actually running it! Here are the key components of good planning:

- Set up a meeting with your United Way Representative to go over the past campaign methods and history (i.e. meeting, activities, pledges, personalized pledge forms, etc.). Analyze past performance.
- Determine in what areas/departments your campaign worked well or how to improve in other areas.
- Set and promote a goal. Goals can include dollars raised, percent participation and/or leadership goals.
- Identify new areas of opportunity (new employees, new management, etc.)
- Set a timeline for your campaign.
- Review and use United Way campaign tools and materials. <http://www.uwv.org/campaigning/>
- Plan special events to create enthusiasm and secure referrals, items and/or incentives for the campaign. For ideas, visit the link above.
- Ensure all your employees are given the opportunity to contribute. Plan to personally distribute campaign materials and pledge forms or work with your United Way representative to set up your electronic campaign.

2. Recruit a Capable, Committed Campaign Team

Include one person from each department on your committee. If you have labor representatives, include them. Recruit team members who:

- are diverse
- represent a variety of departments in your company
- coordinate the company newsletter, public relations, marketing or communications
- are enthusiastic
- are formal or informal leaders who have the trust and respect of their co-workers
- would like to gain leadership and event planning experience

3. Gather Support from CEO and Leadership

With last year's results on hand and a potential goal and strategy in mind, set a meeting with your CEO or managers. The commitment of your CEO is important to reaching your goals. Below are some ideas:

- Ask E-Mail/Mail-in of endorsement for the campaign from the CEO (use your UW Rep for a template).
- Have leadership attend United Way events planned for your company.
- Offer various incentives to donors.
- Provide time to hold a fun, educational, campaign that asks every employee to invest.
- Encourage leadership giving by hosting a leadership meeting.
- Pledge a corporate/company gift.

4. Conduct a Leadership Giving Program (Gifts of \$1,000 or More)

- Set specific leadership giving goals. Work with UW Rep to send out special leadership gifts.
- Conduct a leadership giving breakfast or meeting.
- Ask a current leadership donor who can inspire others to give at this level.
- Ask senior management to be leadership givers.
- Discuss MyFund at all employee meetings. <http://www.uwv.org/take-action/give/myfund/>