

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, 90 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, e-pledge, 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.uwri.org/campaign-hq/>
- Plan special events to creative enthusiasm and secure raffle 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 donors
- 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:

- An E-Mail/Letter of endorsement for the campaign from the CEO (see 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.
- Endorse 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 packets.
- 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.uwri.org/take-action/give/myfund/>

5. Educate and Engagement – Presentations and Fun Activities/Incentives

The most important thing you can do for a successful campaign results is to educate employees about how investing in United Way benefits our community. The meetings or a kickoff sets the tone for your campaign. It can be as simple as a morning meeting with coffee/donuts, or as elaborate as a company lunch or offsite event. Whatever your time and budget allows, the group meeting is at the heart of a campaign. Some ideas:

- Schedule meetings to reach all employees and allow a United Rep to speak at a staff meeting and show the campaign video.
- Share the details of your campaign - how long it will run, any events or activities, incentives for giving, how to pledge, etc. (you or a member of your team). E-mail several reminders.
- Provide food, door prizes, and incentives for giving and attending meetings.
- Ask an employee to share a story about their donations, volunteering or receiving help with United Way.
- Educate everyone about the positive changes their gift makes in the community.

6. Make the Ask

People give to people. The number one reason why people do not give to charitable organizations is because they were not personally asked to do so! Ask every employee to consider giving.

7. Monitor and Report

Reporting your results to United Way helps make sure we can process your employees' pledges quickly and efficiently, allows us to keep close track of the status of the overall campaign, and most importantly enables us to express our thanks to our donors as quickly as possible. It also allows us to discuss following up on any previous year's donors and figure out a plan to contact them to ask them if they'd like to make a gift in this year's campaign.

8. Thank You. Thank You. Thank You.

These two simple words not only show your appreciation for your colleagues' generosity, it sets a positive tone for year-round communications and set the stage for next year's campaign. There are many things to thank people for, and many ways to thank them:

- Announce campaign results and thank colleagues – through e-mail, newsletters, posters, etc.
- Publicly announce activity and incentive prize winners - through e-mail, newsletters - include pictures.
- Sponsor a thank you breakfast, luncheon or reception to the campaign team and/or contributors.
- Distribute thank you awards, mugs, pens, buttons, etc.