

A MODEL CAMPAIGN

10 STEPS TO A SUCCESSFUL CAMPAIGN

1. Attend Employee Campaign Manager Training.
2. Have CEO personally endorse the campaign.
3. Recruit a diverse campaign team:
 - Recruit a campaign team with members from all parts of the company
 - Campaign Team positions include:
 - Next year's Employee Campaign Manager
 - Campaign Activities team
 - Leadership Giving Campaign Chair
 - Payroll Department representative
 - Use comparison data provide by United Way
 - Set non-financial goals
 - Increase participation/Increase new donors
4. Set a challenge goal & communicate it.
5. Hold a separate Leadership Giving Campaign:
 - Select a Leadership Giving Chair
 - Determine potential Leadership Givers (Ex: Annual Salary - \$50,000 or more)
 - Create a specific Leadership Giving presentation in line with organizational culture
6. Educate employees about United Way:
 - Use communication tools (posters, brochures, email blasts, etc.)
 - Set up agency tours for steering committee
 - Schedule speakers for meetings
7. Make giving easy:
 - Encourage using Payroll Deduction
 - Create a FUN campaign (Use incentives)
8. Organize group meetings that ensure 100% of employees are **ASKed** to give.
9. Track progress and follow up on outstanding pledges
10. Report results and say **THANK YOU!**



EMPLOYEE MEETINGS

- Utilize team members for meetings in each department
- Distribute United Way brochure
- Use personalized pledge forms, if possible
- Present facts about United Way
- Use a United Way or agency speaker
- Announce incentives
- Emphasize payroll deduction
- Collect pledge forms at the meeting
- Set a deadline for those wishing to discuss their gift with their family and get back to them

SAMPLE AGENDA

<u>TIME</u>	<u>PROGRAM</u>	<u>BY WHOM</u>
1 minute	Welcome	ECM
2 minutes	UW Campaign Endorsement	CEO
5 minutes	Explain: * Campaign Goal * Incentives * Pledge Form * Payroll Deduction	ECM
15 minutes	UW Info & Campaign Video	UW
2 minutes	Make the ASK Collect pledge forms	ECM/CEO

TURN OVER

As an Employee Campaign Manager (ECM), you are responsible for motivating and coordinating the members of your workplace to raise funds for United Way of the Ohio Valley. We are confident that you will plan, organize and coordinate a fun, informative and successful United Way Campaign.

EDUCATION: Share our community’s needs with every employee and highlight the many ways your United Way is working to create a vibrant, safe and caring community.

SOLICIATION: Give every employee the opportunity to make a campaign contribution.

APPRECIATION: Thank every employee who participates in the workplace campaign.

SIX WEEKS BEFORE CAMPAIGN

- MEET** with last year’s ECM to discuss successes, challenges and ideas as well as review strategies and results from last year’s campaign
- READ** the Easy Guide and the Best Practices located at www.uwov.org under Campaign Central (These are great springboard ideas)
- MEET** with CEO and/or senior manager to schedule your kickoff meeting. Send out an email and post calendars in the break room and by the time clocks
- RECRUIT** another employee or assemble a team to work with you
- ATTEND** one of the Employee Campaign Manager’s trainings (check out www.uwov.org for great resources)

FOUR WEEKS BEFORE CAMPAIGN

- HOLD** your first campaign team meeting to discuss and develop campaign tactics and timing
- PLAN** and schedule a few fun events
- SECURE** prizes for giveaways and drawings
- SCHEDULE** agency tours through your United Way office

TWO WEEKS BEFORE CAMPAIGN

- RECRUIT** and confirm United Way representatives to be at your meeting(s) by contacting the United Way office
- DETERMINE** the agenda for campaign meeting
- SECURE** your campaign supplies and promotional materials

- LOOK** at your company’s history (provided by United Way)
- SEND** solicitation letters to retirees
- CONSIDER** asking the CEO and department supervisors to make their pledges early as “pacesetters” (Then announce this at your kickoff!!!)

ONE WEEK BEFORE CAMPAIGN

- LAUNCH** campaign communications and promotional materials throughout workplace (Posters & incentive info)
- SEND** CEO communication to all employees informing them of their upcoming campaign

WEEK OF CAMPAIGN

- HOLD** a company-wide kickoff meeting or several meetings to build enthusiasm for the campaign
- PUBLICIZE** results everyday
- ENGAGE** employees about United Way with consistent communications, events and promotions
- CONDUCT** employee solicitation and make sure each employee has the opportunity to contribute, either through one-on-one meetings or group meetings
- HOLD** giveaways and drawings for those who have returned their pledge form
- FOLLOW-UP** with past contributors who have not yet responded
- REPORT** progress to all employees regularly

THREE DAYS BEFORE CAMPAIGN ENDS

- SEND** reminder email or phone message that the campaign will soon end
- DETERMINE** final results and meet with CEO to discuss

AFTER CAMPAIGN ENDS

- COLLECT** (signed) pledge forms and follow the Campaign Report Envelop Cheat Sheet
- ANNOUNCE** total amount raised to employees
- CONDUCT** final meeting with campaign team to gather feedback and notes for next year
- THANK/RECOGNIZE** all contributors with a letter, email or event
- NOW – CELEBRATE!**

