

# Steps to a Successful United Way Campaign

Congratulations on being selected as your company's Employee Campaign Manager (ECM). The United Way Campaign staff is ready to assist in any way possible. Please visit Campaign Central on website: [www.uwov.org](http://www.uwov.org) or simply call 270-684-0668 for assistance. We look forward to working together!

## PLANNING

### MEET WITH CEO AND CONFIRM MANAGEMENT SUPPORT

- Review company campaign history.
- Ask for help in goal setting.
- Obtain 'buy-in' to recruit a Campaign Team.
- Secure approval for agency tours.
- Discuss incentives.

### RECRUIT A DIVERSE CAMPAIGN TEAM

- Attend the Employee Campaign Managers Training provided by United Way.
- Recruit Campaign Team members from various levels in all departments.
- Hold Team meeting to discuss campaign goals, objectives, and ways to build enthusiasm.

### ESTABLISH A CAMPAIGN TIMETABLE

- Set campaign kick-off date and special events.
- Notify CEO of selected campaign dates & events.
- Schedule speakers and agency tours through the United Way office.

## MANAGING

### ENGAGE EMPLOYEES WITH AGENCY TOURS AND SPEAKERS

- Offer UW partner agency tours to see firsthand how your campaign makes an impact.
- Schedule an agency to speak at your kick-off meeting or meetings.
- Testimonials from employees who have either received assistance or volunteered with an agency or UW are very helpful when educating employees about the importance of giving.

### PUBLICIZE THE CAMPAIGN

- Advertise through emails and employee publications.
- Campaign posters & goal posters can help track your campaign's progress.
- Incentives may boost giving.
- Encourage employees to visit the United Way website [www.uwov.org](http://www.uwov.org) where "real life" stories and much more can be found.

### CONDUCT EMPLOYEE CAMPAIGN

- 1 week prior to your kick-off, ask CEO to email a letter of support to all employees.
- Conduct campaign kick-off and ask CEO to speak.
- Have pledge forms, brochures, and ink pen on table at each seat.
- Show video, have speaker, ask an employee to share a comment and review incentives.
- Follow up with employees to ensure everyone has been given the opportunity to contribute.

## WRAPPING UP

### REPORT RESULTS TO THE UNITED WAY

- Ensure that all pledge forms are completed.
- Top copy goes to UW, middle to payroll, bottom to employee.
- Place United Way's copy in the Report Envelope with all cash and/or checks.
- Complete Report Envelope, sign, & date.
- Ensure BLUE card is completed and signed.
- Ensure GREEN card is completed and signed, if appropriate.
- Contact United Way office when all paperwork has been completed and reviewed.

### SAY THANK YOU

- Report final results and thank all employees through meetings, emails, newsletter, etc.
- Ask CEO to email a thank you to all employees.
- Evaluate your campaign results and prepare recommendation for next year's campaign.



## ADDITIONAL INFORMATION

### HOW TO CONDUCT A 20-MINUTE CAMPAIGN

ACTIVITY	RESPONSIBILITY	TIME
Welcome & Give United Way Endorsement	CEO	3 minutes
Introduce United Way Video	ECM	5 minutes
Guest Speaker & Q&A	UW Speaker	5 minutes
Employee Sharing Experience	Employee	5 minutes
Review Incentives & Make the ASK	ECM or Team Member	2 minutes

### GREAT TIPS

- Utilize Team members for meetings in each department.
- Have a pledge form, brochure, and ink pen on the table at each seat.
- Present facts about United Way.
- Contact United Way for a speaker.
- Review incentives.
- Emphasize payroll deductions.
- Deductions will not start until January payroll.
- Collect pledge forms at the meeting.
  - Have a special drawing at end of meeting for whomever turns in pledge form before they leave the room.

## CAMPAIGN RESOURCES

Many resources are available at the UW office and by going to [www.uwov.org](http://www.uwov.org) and selecting Campaign Central. Listed below are just a few examples:

- Campaign Brochure
- Pledge Form
- Out-Of-Area Designation Form
- Posters
- Goal Posters
- Campaign Video
- Campaign Report Envelope
- Employee Campaign Manager Handbook (For seasoned and new ECMs)
- Incentive Ideas
- 10 Reasons To Give
- The Difference Your Dollars Make
- Agency Tour Request Form
- T-Shirt Order Form
- Real true life stories

### IMPORTANT CAMPAIGN DATES

September 14, 2018  
United Way Campaign Kick-off

November 15, 2018  
Campaign completed & submitted to United Way

March 2019  
Annual Awards & Recognition Event  
(Date TBA)



United Way of the Ohio Valley



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[www.uwov.org](http://www.uwov.org)

# OH WOW!

## I'M THE EMPLOYEE CAMPAIGN MANAGER?

### WHERE DO I BEGIN?

### WHAT DO I DO?



## IT'S OKAY...UNITED WAY IS HERE FOR YOU



United Way of the Ohio Valley