

10 STEPS TO A SUCCESSFUL CAMPAIGN



United Ways serving
Linn, Benton & Lincoln
Counties

Success is 10 steps away

United Way is here to help you make your campaign a success! These 10 steps will ensure you have the right pieces in place for an impactful and fun workplace campaign.

1. CEO CONTACT

- Involve your CEO in all initial planning and have a plan for incorporating leadership team members into your campaign. This can be as simple as a company-wide email from your CEO sharing his or her story as to why they support United Way.
- Assess your available resources, budgets, and corporate gifting with regards to United Way campaigning.

2. RECRUITMENT

- Recruit a committee, preferably of cross-functional/departmental employees, to help you set your timeline & budget and design your campaign and activities.
- Be creative!
- Delegate tasks and pass down being the committee chair year after year.

3. REFLECT

- Evaluate past campaign performances and calculate this year's goal. Your United Way representative can help, especially when it comes to incorporating new ideas.
- Attend Campaign Coordinator Training.

4. SET GOALS

- Discuss the hard numbers and where you want to grow your campaign (example: greater participation).
- Create non-monetary participation options, like volunteer opportunities.

5. PUBLICIZE

- Share how, where, and when to pledge.
- Incentivize giving.
- Utilize and distribute United Way campaign materials.

6. CONDUCT CAMPAIGN

- Host a United Way Speaker or have United Way set up a guest speaker from a partner agency to present to all staff.
- Create learning opportunities through educational campaign activities.

7. LEADERSHIP GIVING

- Recognize leadership gifts and discuss matched donations.
- Set leadership goals at the leadership level.

8. ASK EVERYONE

- Consider including new hires upon arrival in giving.
- Consider including retirees in your annual campaign.
- In an ever-changing working world, make sure every employee has the opportunity to participate. Consider all shifts and virtual employees.

9. REPORT & THANK

- Announce your final results to your organization and your local United Way in a timely manner.
- Thank everyone involved!

10. HAVE FUN!

- Engage your employees with fun AND meaningful activities, prizes, and volunteer opportunities.
- Your United Way campaign can be a favorite workplace tradition!

