



# 10 STEPS TO A SUCCESSFUL UNITED WAY WORKPLACE CAMPAIGN

## 1 RECRUIT A COMMITTEE & PLAN YOUR CAMPAIGN

- Set your campaign timeline (2-4 weeks is ideal).
- Discuss and/or develop your campaign budget.
- Ask for help - keep in mind people who volunteer are involved because they want to be and will lend energy to your campaign.
- Decide what your campaign activities will look like (see pages \_\_\_ for ideas). Please ask United Way staff to coordinate presentation speakers.
- Assign committee tasks and establish target dates for completion.

## 2 MEET AND ENGAGE THE CEO

- Send out a personal letter of endorsement from your president or CEO.
- Have your CEO participate in kick-off (ex: speech or participation in first pledge turn-in).
- Discuss corporate gift.
- Discuss and/or develop your campaign budget.

## 3 REVIEW & EVALUATE PAST PERFORMANCE & CALCULATE GOAL

- Work with United Way staff to find out your company's giving history.
- Review last year's campaign and any feedback you received as successes and opportunities for growth.
- Incorporate new ideas for this year's campaign and be creative.

## 4 SET EMPLOYEE GOALS

- Create a dollar goal.
- Create a percent participation goal.
- Have a volunteer project available for employees; Reach out to United Way staff for help creating your optimal activity.

## 5 PROMOTE & PUBLICIZE YOUR CAMPAIGN

- Share how to pledge, when to pledge, and what your pledges support (see "Where Your Dollars Go" flyer in the Campaign Toolkit).
- Use United Way materials, available in the Campaign Toolkit (reach out to United Way staff to request printed materials).
- Send email communications to raise awareness about campaign activities and events.
- Create a section on your company's intranet to share information about United Way and your campaign, linking to [www.uwfcpa.org](http://www.uwfcpa.org).
- Provide incentives to encourage giving (see page \_\_\_ for ideas).
- Contact United Way staff for T-shirts or other gifts to give to committees and volunteers.

## 6 CONDUCT AN EDUCATIONAL & INFORMATIVE CAMPAIGN

- Invite United Way staff to present at a large group meeting.
- Use a guest speaker (United Way staff can guide according to your philanthropy).
- Conduct group presentations for all departments if large meetings are not an option.
- Ensure all employees receive United Way materials.
- Follow up with employees to ensure everyone has been given the opportunity to contribute.



## PROMOTE LEADERSHIP GIVING

- A. Discuss Leadership Giving (\$500+) matching opportunities.
- B. Discuss with your CEO the opportunity for them to recognize Leadership donors within the company (ex: lunch with the CEO, see page \_\_\_ for incentive ideas).
- C. Share the "Leadership Giving 101" handout available in the Campaign Toolkit.
- D. Host a Leadership Luncheon, inviting company managers and executives as well as Leadership Givers



## ASK EVERYONE TO GIVE

- A. Ensure you ask every person to give by asking your committee and any other advocates to reach out to their co-workers (people say the number one reason they didn't give is because they weren't asked).
- B. Include everyone, both active employees and retirees.
- C. Ask your new hires as part of the onboarding process.
- D. Inform employees of the ways they can continue to give, advocate, and volunteer in our community.
- E. Identify peer-to-peer opportunities for asking.



## REPORT RESULTS & SAY THANK YOU

- A. Recognize individuals, groups, and department that went "above and beyond" during the campaign.
- B. Announce your final results to all employees through a community from your CDO and/or conduct a final activity.
- C. Thank everyone at the time of giving - offer thank you cards or a small gift from the company for their participation.
- D. Make a "Thank You" display somewhere in the office or on your intranet.
- E. Give special thanks to your committee (reach out to United Way staff to request T-shirts or other gifts).
- F. Collect all pledge forms, place them in your provided report envelope, complete the envelope, and return to the United Way office.



## HAVE FUN!

- A. Engage your employees with activities that educate about United Way.
- B. Provide special pledge incentives or prizes for people that are first-time donors, have increased giving and/or other levels you feel appropriate to award.
- C. Volunteer together.

*Review the following pages for some ideas to make your campaign fun!*



**CHANGE STARTS HERE**  
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