

# 10

## Steps to a Successful United Way Campaign!

Congratulations on being selected as your company's Employee Campaign Manager. Not only are you providing a tremendous service to your company, but your efforts will also make a difference - improving lives and building a stronger community. United Way of Elgin staff are ready to assist ECMs however possible. Please visit the Campaign page on [www.uwelgin.org](http://www.uwelgin.org) or simply call 847-741-2259. We look forward to working together and the success it will bring.

- 1 Meet and Engage with your CEO**
  - Send out a personal letter of endorsement from your president or CEO
  - Have your CEO be a part of your kick-off (i.e. speech or participation in first pledge turn-in)
  - Discuss corporate gift
  - Discuss and/or develop your campaign budget
- 2 Recruit a Committee and Plan your Campaign**
  - Set your campaign timeline (we recommend ten days max)
  - 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 (presentations, activities, food and prizes) Please ask your United Way staff member to coordinate presentation speakers
  - Assign committee tasks and establish target dates for completion
- 3 Review and Evaluate Past Performance and Calculate Goal**
  - Work with United Way staff person and find out about your company's giving history (3 year history is available for your organization from UW contact)
  - Review last year's campaign and any feedback you received as to what worked and didn't work
  - Incorporate new ideas for this year's campaign (see ECM Toolkit and be creative)
- 4 Set Employee Goals**
  - Create a dollar goal
  - Create a percent participation goal
  - Have a volunteer project available for employees (Please work with United Way staff member to create your optimal activity)
- 5 Publicize your Campaign**
  - Share how to pledge, when to pledge and what your pledges support
  - Use provided United Way materials (i.e. posters, videos, brochures, online)
  - 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 company's campaign, linking it to United Way's website ([www.uwelgin.org](http://www.uwelgin.org)).
  - Use incentives to encourage giving
  - Order United Way T-shirts for employees who pledge at least \$25/month.
- 6 Conduct an Educational Campaign**
  - Invite United Way staff to present at a large group meeting
  - Use a guest speaker (UW can arrange)
  - Conduct group presentations for all departments if large meetings are not an option (Remember United Way staff is excited and available to attend all your presentations)
  - Ensure every employee receives United Way materials
  - Follow up with employees to ensure every employee has been given the opportunity to contribute
- 7 Promote Leadership Giving**
  - Discuss with your CEO Leadership Giving matching opportunities
  - Discuss with your CEO the opportunity for him/her to recognize Leadership donors within the company (i.e. lunch with the CEO)
- 8 Ask Everyone to Give**
  - 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)
  - Include everyone, both active employees and retirees
  - Ask your new hires as part of the HR package
  - Inform employees of the ways they can continue to Give, Advocate and Volunteer
- 9 Report Results and say Thank You**
  - Recognize individuals, groups and departments that went "above and beyond" during the campaign
  - Announce your final results to all employees through a communication from your CEO and / or conduct a finale activity
  - Thank everyone at the time of giving—offer a thank you card or small gift from the company for their participation (templates available online)
  - Make a "Thank You" display (hang posters, campaign activity photos and mementos of the campaign)
  - Give special thanks to your committee (hold a special coffee break where everyone receives a United Way mug and a special thank you from you and the CEO)
  - Collect all pledge cards, place them in your provided report envelope, complete the envelope and schedule a pick-up with your United Way representative.
- 10 HAVE FUN!**
  - Engage your employees with creative activities that also educate about United Way
  - Provide special pledge incentives, such as prizes for certain people such as first time donors, increased giving and/or other levels you feel appropriate to award.
  - Volunteer together ([www.uwelgin.org](http://www.uwelgin.org))

Thank you for your hard work!

**GIVE. ADVOCATE. VOLUNTEER.**



United Way of Elgin