

Follow these Six Steps to a Successful United Way Campaign to make your job easier and the outcome greater!

1. GET STARTED

- Set up a meeting with your UW representative
- Review and evaluate past campaigns
- Identify growth areas
- Set a goal
- Develop a timeline

2. GET DEPARTMENT HEAD OR SENIOR MANAGEMENT INVOLVED

Support from your department head and senior management is crucial. Their support and enthusiasm can be contagious and leadership involvement sets an example for other contributors, while emphasizing the importance of the campaign to both your organization and the community.

Tips for getting senior management involved:

- Ask them to send a personal letter to every employee asking for their support of United Way.
- Obtain permission for group employee meetings. Include your department head as part of the program.
- Encourage department head support of special events, kickoff event and incentives.
- Ask them to thank donors at the end of the campaign through letters and/or an event.

3. ENLIST THE HELP OF COWORKERS

Don't try to do it all alone. Include people with special talents such as marketing, communications and accounting. Recruit energetic and enthusiastic representatives from all Departments. Together, determine the best ways to engage employees:

- Set a challenging fundraising goal and develop a strategy to achieve it.
- Increase participation.
- Increase average gift.
- Add more Leadership Givers.

4. CONDUCT THE CAMPAIGN

The most successful way to ask employees to contribute is through group solicitation. Bring small employee groups together via zoom (goto meeting, teams ,, etc) to view the

United Way videos, hear a speaker and receive United Way literature by email. Ask employees to make their pledges at the close of the meeting.

- Consider electronic pledging option; contact your United Way representative for more information.
- Publicize your campaign events in advance through employee newsletters, bulletin boards and e-mail.
- Incorporate fun events and incentives such as gift certificates, special online events, fundraisers, prizes, etc.
- Encourage payroll deduction as the easiest way to give.
- Conduct the campaign through group Zoom meetings, one-on-one solicitation by phone or email, follow up and Leadership Giving efforts.
- If your workplace operates different shifts, it is important to develop a campaign plan that involves every employee on every shift.
- Follow up on absentees and part-time employees.
- Consider inviting retirees to your campaign events and asking them to contribute.

5. CAMPAIGN COMPLETION

- Follow up and collect pledge forms, cash, and checks.
- Complete campaign pledge listing and summary forms.
- Complete campaign report envelope and include United Way copy of pledge forms.
- Provide pledge forms/online pledge report to the appropriate person in your payroll department to have payroll deductions set up for 2016.
- Evaluate your results and prepare written recommendations for next year's campaign.

6. SAY THANK YOU

The most important step is thanking those who contributed. Your employees made it happen! By making donors aware of the importance of their contributions, you show appreciation while encouraging future giving as well.

- Report final results to employees.
- Post "thank you" messages in highly visible areas. Blanket bulletin boards, newsletters, cafeteria, and intranet with "thank you" messages.
- Have department head send a "thank you" letter to the campaign team and employee donors.
- Host campaign wrap-up virtual event for employee donors.