

# Steps to an Effective Group Presentation

Without question, a presentation of some sort — whether it is one-on-one or to a group — is essential to the success of your campaign. Talk with your United Way representative to determine which type of presentation is best suited for your organization.

A presentation is not only an excellent opportunity to provide employees with information about how their contributions will be invested to improve the health of the community, but also gives them the opportunity to ask questions about United Way.

## Steps to an Effective Group Presentation

### 1. Plan

- Make your own donation before asking others to give.
- Promote the campaign before you meet with employees.
- Announce the time frame for your campaign.
- Choose a time and place that is convenient to the most people possible.
- Invite your United Way representative and/or an agency speaker to attend.
- Personally invite employees to attend. The ideal size is 25 to 50 per presentation.
- If possible, use incentives to encourage people to attend (food, door prizes, etc.)

### 2. Organize

- Games and decorations can make your presentation fun.
- Personalize the pledge forms and don't forget to bring pens.  
(United Way of Summit County can help you with personalization)
- Order supplies and materials including brochures and the United Way campaign video. Test the VCR and TV or projection system prior to the meeting to assure smooth operation during the meeting.
- Prepare your presentation, but keep notes to a minimum. Do not read a statement to the employees. Refer to notes only to keep you on track; speak conversationally and use a lot of eye contact.
- Plan for no more than 20 minutes.

### The Goal of the Presentation

- To outline our community's needs
- To educate employees on how United Way is uniquely qualified to ensure their contributions have the greatest impact in the community
- To request a charitable contribution through United Way

### 3. Meet

- **Pass out pledge forms to all employees personally (don't leave them on a table for employees to pick up). Encourage employees to fill out the pledge cards during the meeting if they choose to give.**
- Opening remarks (2 minutes) - your department head should open the meeting with a few words about the company's history of employee campaigns and his or her commitment to this year's campaign.
- Overview (5 minutes) - your United Way representative and/or an agency speaker will explain investments that United Way makes in your area and the counties served by United Way and its partner agencies. The agency speaker can give vivid illustrations of donors' dollars at work by telling the stories of people whose lives have been changed.
- Show the campaign video (3 minutes)
- Ask for pledges (1 minute) – the ask should come from the team leader, a fellow employee or a campaign team member who has already given.

- Questions (2 minutes) - answer a few questions in front of the group. End the meeting on time by thanking the employees for coming and telling them that you, the representative and/or the agency speaker will be available to answer additional questions after the meeting.

#### 4. Follow Up

- Collect all pledge forms.
- Distribute incentives.
- Follow up with those who missed the meeting.

#### Techniques to Avoid

- Assuming that people already know about United Way.
- Asking people to speak to employees without providing them with talking points.
- Dropping off pledge forms without explanation.
- Mailing pledge forms to employees (historically, this has been the least effective option) -
- Arguing with people who have concerns or questions (your United Way representative can provide answers to questions, if needed).
- Making a gift mandatory. United Way is opposed to any type of coercion - it is contradictory to our operating standards.

*Remember, When people are asked why they did not give, the most often heard response is... “I was never asked!”*



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