

# Seven Steps to a Successful Campaign

## 1. PLAN, PLAN, PLAN

EVALUATE PAST PERFORMANCE / SET A GOAL / INVOLVE TOP MANAGEMENT

### A. EVALUATE PAST PERFORMANCE

Here is an easy way to analyze last year's campaign performance.

$$\frac{\$ \text{last year's employee total}}{\# \text{ givers}} = \$ \text{average gift}$$

$$\frac{\# \text{ givers}}{\# \text{ employees}} = \text{percent participation} \%$$

Talk with the previous year's campaign coordinator to learn:

- In what areas/departments did your campaign work well?
- What are your areas for improvement?

### B. CONSIDER A CAMPAIGN GOAL

Look at your figures from Part A. If leadership giving is 10% or more of your total campaign, determine the average gift less leadership giving when considering potential. Consider the following:

- If you had a series of good campaigns with high participation and high average gifts, consider setting a reasonable percentage increase over last year's total gift.
- If the average gift is high, but participation is low, target a higher participation rate. A strong education piece about United Way's effect in the community will encourage more people to contribute.
- If participation is good, but average gifts are low, target a higher average gift. Suggesting a guide for giving (e.g. one percent of salary or one hour's wage per month) will increase results.
- Consider conducting a Leadership Giving program for your company's higher compensated employees. For more information, contact Beth Houseman, Director of Leadership Giving at 330.643.5519.

### C. MEET WITH TOP MANAGEMENT TO DISCUSS A CAMPAIGN GOAL AND THEIR INVOLVEMENT

With last year's results on hand and a potential goal in mind, set a meeting with your CEO. Reaching this goal depends to a great extent upon the commitment of your CEO.

The following checklist will turn your CEO into a champion of the United Way campaign:

- Showing his/her personal commitment to the campaign through active involvement during meetings, events, direct communication with your employees, and his/her personal gift.
- Setting a challenging campaign goal for your organization.
- Providing the time and resources needed to hold a fun, educational, non-coercive campaign that asks every employee to invest.

- Conducting a leadership campaign for middle and upper management. Making or increasing a (the) corporate gift.
- Asking employees to invest as they are hired.
- Actively involving your retirees in United Way investing.
- Providing information to employees about ways that they can be involved with United Way of Summit County.
- Distributing and posting United Way information at your workplace.

### Helpful Hint

Keep in mind that 90 percent of your time is spent planning and organizing your campaign and only 10 percent is spent running it.

## 2. RECRUIT AND TRAIN YOUR TEAM

Your campaign team can help spread enthusiasm and information about United Way and your company campaign. The size of your team depends on the number of employees and the number of locations you have. Even if your organization is small, it is beneficial to have help with the campaign.

### ***Recruit employees who:***

- Are members of the Leadership Giving Torch Club
- Were enthusiastic members of last year's team
- Have benefited from, or volunteered for, a United Way program
- Have served on Community Investment Panels
- Participated in Day of Caring
- Represent a variety of departments in your company
- Coordinate the company newsletter, public relations, communications or marketing
- Are Labor Union Leaders (if appropriate)

### Helpful Hint

Try to include the informal leaders of your company. These people already have the respect and trust of their co-workers and will be influential when it counts.

Schedule a training session for your team. Training will not only help to motivate your team but will also improve their skills. Your United Way Contact Person (check the business card attached to your folder) will be happy to conduct a 30-minute team training workshop at your place of business. To schedule a training session, if you are not sure who your contact person is, contact United Way of Summit County at 330.643.5517.

### 3. USE UNITED WAY'S CAMPAIGN RESOURCES

The most important thing you can do to increase campaign results is to educate employees about how investing in United Way benefits our community. Also, United Way's Marketing department can help you to schedule program speakers for employee meetings and program tours for your company's employees.

#### Helpful Hint

To schedule a speaker, agency tour or to request a Sales Service America Catalog, contact Barb Stewart, Marketing Administrative Assistant at 330.643.5533. Please allow one or two weeks for scheduling.

#### ***Campaign Materials***

United Way provides a variety of educational and audio-visual materials to assist in your campaign. Please help us keep our fundraising costs low by returning banners, videos and flags when you are finished running your campaign. Contact Barb at 330.643.5533.

#### ***Communicate Your Goal***

Incorporate your company's goal in your campaign's publicity. Many companies like to use United Way Goal posters placed in prominent locations throughout the workplace.

Your campaign success is directly related to the involvement you generate from your fellow employees. So start spreadin' the news! You'll find lots of ideas in the Communications and Fun Events portions of this Kit. Also, consider:

- A letter of endorsement from your CEO
- Thank you letters
- Solicitation letters to your retirees
- Your Marketing/PR/Communications resources
- Electronic "Thank You" cards

United Way can preprint your pledge forms – contact your United Way at 330-643-5517 or call your staff person. Be sure to have cards available for all employee meetings.

### 4. MEET AND EAT!

It's finally here. The main focus of your campaign will be your group meeting or kick-off. This can be as elaborate as a company picnic for hundreds, or a simple morning meeting with coffee and donuts.

#### Helpful Hint

Implement some fun incentives to help reach your goal. Some companies encourage friendly competitions between departments. Others give days off with pay to reward certain levels of United Way contributions. Make sure that you HAVE FUN!!!

The group meeting for employees is at the heart of an effective employee campaign. It is your primary opportunity to tell the United Way story to your fellow employees. Keep the tone lively, brief and informative. Here is a suggested agenda that takes just 20-25 minutes!

<b>PROGRAM</b>	<b>BY WHOM</b>	<b>TIME</b>
<b>Distribute Personalized Pledge Forms and Brochures</b>	CEO, Coordinator	5 minutes
<b>Welcome &amp; Overview</b> (Purpose of meeting, what you will present, etc.)	Coordinator	2 minutes
<b>Campaign Endorsement</b> (Explain why you support United Way, share experiences, etc.)	CEO/Labor Representative (as appropriate)	3 minutes
<b>How United Way Helps AND/OR United Way Film</b>	United Way Staff or Program Speaker	5 minutes
<b>Collect Pledge Forms</b> (If soliciting by group)	Employee Coordinator	3 minutes

**Thank You, Thank You, Thank You!!!**

## 5. MAKE THE ASK!

### Helpful Hint

The number one reason that people do not give to charitable organizations is because they are not personally asked to do so. Who knows how many of the people you will ask to give this year, will do so just because you made the extra effort?

Please ask every employee using either group or individual (face-to-face) solicitation and encourage payroll deduction gifts. **Remember, people give to people, so don't overlook this critical step!**

#### **Group Solicitation**

As employees enter the group meeting, distribute personalized pledge cards with a copy of the campaign brochure. Emphasize the importance of the contributor's signature on the pledge card for payroll deductions. Employees should turn them in at the end of the meeting.

Follow up with everyone. This ensures that all employees have the opportunity to participate.

#### **Individual Solicitation**

Following your employee group meeting, a team member or you should visit fellow employees face-to-face to ask for a gift. Thank everyone, even if they choose not to give. See the One on One Solicitation Guide for more information on face-to-face follow up.

### ***Retiree Solicitation***

Many companies will send retirees a letter of solicitation from a respected retiree along with a pledge form and return envelope. Letters should stress the importance of retirees to your company, as well as to the needs of the community and the success of the United Way programs and services. Consider providing information to new retirees as they exit your organization. Samples are included in the Campaign Coordinator's Guide.

### ***New Hires Solicitation***

As new employees are added, this is the perfect opportunity to give them the option to participate in your United Way campaign and get involved in the community.

### ***Leadership Giving Solicitation***

See the Leadership Giving section for more information.

## **6. REPORT THE RESULTS!**

Please review the following steps to report employee campaign results and return pledge forms to the United Way office for reporting purposes.

**Step 1** - Complete the corporate pledge form and obtain the CEO's signature and record on corporate pledge line on campaign report envelope.

**Step 2** - Collect all employee pledge forms. Review all information for completeness and accuracy. Check form for signature. Sort all employee pledge forms by method of giving. Rubber band or otherwise separate cash/check pledge forms, payroll deduction pledge forms and direct bill pledge forms. Credit card and stock givers are considered direct bill givers.

Total the employee pledge forms by method of giving and record the number of givers and the total pledge amounts in the appropriate lines on the campaign report envelope.

Total the amount of cash and checks you are enclosing in the envelope. Paper clip cash and checks to the related cash/check employee pledge form. Please do not staple cash or checks to pledge forms.

Record whether the campaign envelope reflects a partial report or a final report from your company.

Provide your fax number if you want our audit room to confirm your submitted totals to you.

**Step 3** - After the pledge forms are counted and the campaign report envelope is completed you should insert all the forms in the envelope and seal the envelope. Employee pledge forms and related cash and checks should be inserted in the campaign report envelope; also complete the Leadership Giving Log and attach it to the outside of the envelope. Call your United Way contact person to pick up the completed envelope.

### **Helpful Hint**

Keep a notebook or file of your plans for next year.  
You or your successor will be glad you did!

## **7. SAY THANKS!**

“Thank You.” These two simple words not only show appreciation, but also set a positive tone for year-round communications and next year’s campaign. Here are some ideas that will help you conclude your successful campaign.

- Announce company and community campaign results
- Send a thank you letter or email (see our templates) to each company contributor
- Write a thank you editorial in your company newsletter
- Sponsor a “Thank You” breakfast, luncheon, or reception for your contributors or team.  
This can be as simple as coffee and donuts or cake and punch.
- Distribute thank you awards, mugs, pens, buttons, etc. to campaign team and/or contributors.

---

**www.nsbuw.com**  
**805-922-0329**