

# Eight steps to Success

The following steps will have you well on your way to a successful workplace campaign. Remember your United Way representative is always available to assist you.

## 1 LETS GET STARTED

4-5 weeks before campaign

- Set up a meeting with your United Way staff. Identify growth areas.
- Make sure United Way has accurate information about your company (CEO, address, phone, fax, number of employees, e-mail, etc)
- Review these steps to success and prepare in advance. Don't let your campaign sneak up on you.
- Implement a communications plan that includes sending facts about United Way to your employees
- Promote your campaign with the click of a mouse or push of a button. Via e-mail or voice mail, these messages demonstrate how a contribution to United Way helps our community

While planning for your campaign this year, it's important to look at past campaign results for your company.

You'll be able to see the number of employees that are giving and at what level. These numbers will help you plan your campaign to make the most impact in the community. Ask United Way for specific information relating to your companies past campaign results.

## 2 CEO/SR EXECUTIVE INVOLVEMENT

4-5 weeks before campaign

The support of top management is essential to a successful campaign. Keep them informed and involved by asking them to:

- Announce your role as ECC
- Appoint next year's ECC to work with you. This will ensure a smooth transition each year
- Give a corporate gift
- Authorize a payroll deduction contribution plan for employees if one does not exist. *Companies that use payroll deduction raise more money than those who do not.*
- Endorse a plan for leadership solicitation and, if appropriate, appoint a Leadership In Giving coordinator
- Review your overall campaign plan and goal
- Allow adequate time and resources for campaign planning, your attendance at ECC training, agency tours and employee solicitation
- Send a personalized letter of endorsement
- Attend campaign events and endorse United Way

Contact United Way at 437-2313 or email Mandi at [unitedml@smig.net](mailto:unitedml@smig.net) with any questions.

# 3

## CAMPAIGN COMMITTEE

4-5 weeks before campaign

- Recruit a committee that will work together on the campaign. Include retirees, past Leadership In Giving donors and people from all departments
- Executive on your committee to assist with planning
- Clearly define roles and responsibilities
- Talk with your team about strategies and events that will work in your company
- Appoint next year's ECC to serve as your assistant/vice co-chair
- Team members can help you follow up with your employees during your campaign

# 4

## THE PLAN

2-3 weeks before campaign

- Decide what will work best for your company's environment. Budget and company culture should determine the type of campaign you plan
- Decide on a theme, activities, incentives and a thank you event
- Select and announce a campaign kickoff date and employee meeting(s)
- Develop detailed timeline and calendar to identify target dates and track your progress
- Set a challenging goal based on total dollars raised and/or percent of participation
- Have a Leaders In Giving event as part of your campaign plan

# 5

## BUILD MOMENTUM

1-2 weeks before campaign

- Use as many of the United Way campaign materials as possible including brochures, posters, table tents, payroll stuffers and video.
- Contact your local United Way Executive Director to speak at your kickoff or training event.
- Promote the ease of payroll deduction and the power of investing in United Way.
- Seek out creative ideas and incentives from your United Way representative

### SUCCESS BY 6: Preschool Scholarship Program

22 total scholarships awarded to: sixteen 4 year olds & six 3 year olds

### TRANSPORTATION PROGRAM:

35 children were transported to/from preschool, five days a week on Rainbow Route

### GET FIT MOWER COUNTY HEALTHY LIVING CHALLENGE:

117 teams, 702 participants lost 2,333 lbs. 14 family teams completed 161,355 minutes of activity during 9 week competition

# 6 EDUCATION CAMPAIGN

During campaign

- Hold special events for your Leaders In Giving donors and prospects
- Schedule employee group meetings for every employee to attend
- Distribute campaign pledge cards and consider a drawing for everyone who returns a pledge card by a deadline date
- Ask current contributors to increase their gift or goal thermometers where they are visible to employees. Update materials periodically to let employees know the distance to go to reach your goal
- Communicate, communicate, communicate
- Utilize your company's primary communication channels
- Communicate reasons to give, company pride, support, events, campaign progress, etc.
- Provide information on United Way's work in the community (2007 Results Sheet). Ask your United Way representative for more information.

# 7 TIME TO WRAP IT UP

Week following campaign

- Collect all pledge cards
- Hold prize drawings for campaign participants
- Schedule a wrap-up meeting with your United Way staff to close out the campaign. Turn in corporate envelope, unused campaign materials, final checklist, and updated organizational information
- Send a letter from your CEO announcing your company's final campaign results
- Thank employees for their contributions of time, effort and money
- Recognize your campaign committee

# 8 WHAT COMES NEXT

- Establish a new hires program at your company to replace contributions from those with employment changes, moves, etc.
- Create year-round communication strategies
- Contact United Way to get information to include in monthly or quarterly newsletters. This helps employees see their charitable dollars at work
- Encourage employees to contact United Way year round for volunteer opportunities. All opportunities can be found on our website at [www.uwmower.org/volunteer](http://www.uwmower.org/volunteer).

## DAY OF CARING

167 volunteers completed 31 projects

## VOLUNTEER MOWER COUNTY:

On-line database matching volunteers with volunteer needs

## COMMUNITY OUTWEAR DRIVE:

253 children & adults received coats and other necessary winter outerwear