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**LIVE UNITED**



# Steps to Success

8 tips to a successful  
United Way Campaign



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## **Eight Steps to Success**

### **1. Get Started**

- Understand your role and what's being asked of you. Any questions? Call the United Way! 962-2700. We'll help you any way we can!
- Visit a United Way Agency.
- Review United Way materials.
- Meet your United Way staff person.

### **2. Know Your Organization.**

Knowing your organization's United Way history gives you a place to begin.

- Talk to last year's Coordinator. Find out what worked and what didn't work in your organization.
- Work with your CEO or Manager to set goals based on your organizational values, the number of employees you have and last year's performance.

### **3. Enlist Support**

This job is much easier and more fun when you have some help.

- Your CEO or Manager's enthusiasm can be contagious. Ask him or her to write a personal letter of support to all employees. Sample letters can be obtained from the United Way.
- Recruit a committee representing all of the departments in your organization.
- Recruit coworkers you work well with and have the skills you need.

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## 4. Decide on a Solicitation Style

Decide on the best method of approaching fellow employees; individually, in a group, or both!

- *Group Solicitations:* Employees are brought together to hear the United Way message and are then asked to fill out their pledge cards at the end of the presentation. Group solicitation allows for the best use of time and, because employees hear a uniform message, less follow-up is required.

**OR**

- *Individual Solicitation:* This is a one-on-one ask for an employee to make a gift. This style involves more employees but personalizes the campaign and affords you a greater opportunity to answer individual questions.

**OR**

- *Both:* Hold one group meeting or a series of meetings and use the one-on-one solicitation as a means of follow up for those who couldn't attend a group session.

## 5. Promote Your Campaign

By promoting your campaign, you encourage others to get involved.

- United Way brochures, posters and thermometers can all build awareness of the upcoming campaign. United Way provides these at no cost to your organization.
- Promote and publicize your campaign in employee newsletters, e-mail and other in-house communication tools.
- You can increase employee awareness and involvement by creating competition between departments. Prizes and incentives can also create interest.

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## 6. Educate

The United Way has many resources available to help you run an effective campaign. Videos, speakers and agency tours are excellent ways to show how United Way dollars are working in our community and can enhance the effectiveness of your campaign meetings. These all help “ask” for you.

- *Videos:* United Way’s campaign video is a great addition to your meeting. The video is produced locally and highlights people living in our community and how they Live United through giving, advocating, and volunteering. You can get a copy of the video by going to the United Way website – [www.givetheunitedway.com](http://www.givetheunitedway.com) or by calling the United Way office at 962-2700.
- *Speakers:* United Way representatives and/or agency representatives are available to speak at your organization and are eager to share their stories. Presentations can be tailored to last anywhere from 3 minutes to 15 minutes depending upon your needs. A presentation by one of these speakers will personalize your employee meeting.
- *Tours:* Motivate employees to give by providing a firsthand look at how contributions make a difference in our community. Tours of United Way Agencies significantly impact the results of an employee campaign. Tours usually last about 30 minutes plus travel time per agency and can be arranged to accommodate your employees’ schedules.

## 7. Implement Your Campaign Plan

Schedule a short, intensive campaign. A two or three week campaign has proven to be the most effective. Short campaigns keep momentum and enthusiasm high.

- Give. It’s easier to ask others to give when you are already giving.
- Use personalized pledge cards to make sure everyone has an opportunity to contribute.



- Conduct an employee kick-off celebration. Use the United Way video or a speaker in your meeting to make employees aware of the services provided locally.
- 100% Ask. Make sure every employee is asked to give. Don't forget employees who work off-site, travel extensively or are on alternate shifts.

## 8. Report Your Results & Say “Thank You!”

It is very important to report your results to United Way as soon as possible following the completion of your campaign.

- Make sure all pledge cards are returned. Turn all payroll deduction cards into your payroll office.
- Summarize all campaign information on the report envelope. Enclose cash, checks and copies of pledge cards. Fill out the designation and leadership giving forms that were included with your campaign materials..
- Call United Way to pick up your report envelope.

The most important step in the United Way Campaign is thanking those who gave. By making donors aware of the importance of their contribution, you not only show appreciation, but encourage future giving as well. Here are some thank you ideas:

- Report final campaign results with employees.
- Post thank-you messages **BOLDLY** in highly visible areas.
- Have your CEO send thank-you letters to the campaign team and donors.
- Host a campaign-ending event with free refreshments, entertainment and any awards.

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## The United Way Philosophy:

At the United Way we want to ensure everyone has the **OPPORTUNITY** to support the community. We combine that opportunity with information so that prospective donors know what is being asked of them. We want them to know what United Way does and how it does it so they can make an **EDUCATED** choice! Finally, we **RESPECT** their decision. Giving to the United Way is voluntary.

If your coworkers have the opportunity to give and are educated about the United Way then you've done great - regardless of their giving decision!

**Don't be afraid to say you don't know.** Let those with questions know you'll get back to them with answers or they can call United Way. The United Way can be reached at 962-2700 for answers to any questions that come up. You aren't expected to be a United Way expert.