

MANAGING A SUCCESSFUL CAMPAIGN

10 STEPS TO A SUCCESSFUL UNITED WAY ANNUAL CAMPAIGN



1 6 Months Before Campaign: Get to Know United Way of Whitewater Valley

- Meet our local United Way staff by calling 765-962-2700 to learn about our impact and the annual employer giving campaign.
- Follow us on our social pages: Facebook page, Twitter or Instagram.
- Participate in community events and meet other volunteers.



2 5 Months Before Campaign: Talk to Your Organization's Senior Leader/CEO

- Talk to your CEO about the importance of hosting this annual event, schedule a meeting to discuss United Way of Whitewater Valley's Annual Campaign. Invite us, we are happy to go with you to discuss the annual campaign. Decide how long your campaign will run. Some organizations host mini-campaigns/24 hour campaigns and other organizations' campaigns last a week, a month or a quarter.
- Discuss the Corporate Gift amount, options might be a flat amount or a match.
- Determine the budget amount for the kickoff campaign.
- Decide the CEO's level of involvement. For example, will they do a kickoff video and send an email encouraging employees to participate, or will the CEO join the kickoff day to excite the team about the giving campaign.



3 4 Months Before Campaign: Build Your Campaign Committee & Create a Plan

- Ask team members early! Remember to ask team members so, you get those that are genuinely excited about helping. (no one likes being volun-told) Don't forget to ask a diverse group of individuals from various departments.
- Create a plan of roles and responsibilities. Develop a roadmap of activities leading up to the campaign kick off in September.
- Develop a budget spending plan based of what was approved by CEO.
- Brainstorm campaign activities, see our list of campaign ideas on our Campaign Toolkit page.
- Decide which pledge process you will be using:
 - ePledge
 - Mobile Cause / Text to Give
 - Online Pledge Form
 - Paper Pledge



4 3 Months Before Campaign: Set Goals

- Set a goal for the annual campaign, this may be % of employees that participate, a specific amount to be raised or other similar goals.
- Contact us to learn about your company's past annual campaign performance. If this is your first campaign, we can help you determine realistic goals.



5 2 Months Before Campaign: Train Your Team

- Contact us to receive training on managing the annual campaign and activities.
- Host a training/orientation session for your Campaign Committee.
- Schedule a training session for your unit reps/department leads (if applicable).



6 2 Months Before Campaign: Plan Campaign Kickoff Day Activities

- Coordinate CEO video, kickoff email or other promotion assets.
- Visit our Campaign Toolkit page for an email auto signature, flyers and other digital assets to promote the campaign.
- Order the prizes for the campaign kick off day activities. Don't forget, we've created a list of campaign kickoff day activities on our Campaign Toolkit page.
- Consider ordering United Way of Whitewater Valley T-Shirts for Committee members to wear on the kickoff day.
- Consider a guest speaker, contact us to help you coordinate the right fit speaker.