

7 Steps for a Successful Campaign Columbia County United Way

THE FOLLOWING STEPS WILL INSURE A SUCCESSFUL CAMPAIGN

1. GET CEO SUPPORT

- Get CEO approval for campaign
- Secure a budget and make sure time is allocated
- Have CEO send an endorsement letter or email to kick-off the campaign

2. GET GOING!

- Set up a meeting with your United Way Campaign Manager to assist in planning the campaign
- Make sure United Way has updated information of your company
- Recruit a Campaign Community, try to pick for all departments
- Implement a communication plan that lets United Way know facts and give employees the impact of contributions and stories of campaign
- Decide on special events, activities, incentives, and thank you events. Created around the theme: “Be Part of the Team That Makes Great Things Happen”

3. SET GOALS & TRACK RESULTS

- Set a challenging goal based on total dollars raised and participants
- Advertise the goal
- Track and report progress

4. CONDUCT AN EDUCATIONAL CAMPAIGN

- Determine when meetings take place
- Schedule employee meetings or add United Way to the agenda for standing meetings
- Invite your United Way Campaign Manager and a Partner Agency to meetings
- If your company is Union, use UW labor resources
- Build momentum for your campaign 1-2 weeks in advance. Use newsletters, websites, and intranet
- Place United Way banners, posters, and goals that are visible for employees. Let employees know progressive of goal
- Distribute campaign pledge forms to all employees.

HOW TO BRING
YOUR
UNITED WAY
CAMPAIGN
TO LIFE
GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED

5. HOLD A LEADERSHIP CAMPAIGN

PLAN LEADERSHIP PROGRAM:

- Review last year's efforts and results
- Have the CEO help you identify a new leadership givers
- Set a realistic goal for new givers or increases in giving
- Set a date for the Leadership Giving Meeting

AT THE MEETING:

- Involve the CEO, United Way Campaign Manager and a Partner Agency Speaker
- Ask a current Leadership Giver why they support the United Way
- United Way will provide personalized packet for current or new givers for distribution
- Thank each donor

6. WRAP IT UP & SAY THANK YOU!

- Collect all pledge forms from employees and complete the campaign reporting form. All forms of payments should be placed in the report envelope
- Set a time to meet with Campaign Manager to collect the report envelope
- Ask the CEO to announce the campaign results and thank the employees for their support (Post internal or personalized notes)

7. COMMUNICATE YEAR-ROUND

- Establish a "new hires" program by utilizing the New Hire packet
- Add United Way to company's newsletters or staff meetings
- Encourage employees to join a giving society to experience networking, professional development, social and volunteer opportunities.
- Take a tour of a Partner Agency and see donor dollars in action

CHANGE
STARTS HERE.
CAN WE COUNT YOU IN?

**United Way of
Columbia County, Pa**

Thank you for being part of
the change and investing in
your community.

**United
Way**



**WORKING TO ADVANCE
THE COMMON GOOD**

