

Eight Steps to Running a Successful Campaign

Step # 1: GET STARTED

Attend United Way's Employee Campaign Coordinator training.
Learn the importance of United Way
Review United Way materials
Meet with your United Way representative

Step # 2: ENLIST SOME HELP

This task is much easier and more fun when you involve others.
Ask your CEO to appoint next year's Employee Campaign Coordinator (ECC) to work with you.
Recruit a committee representing all of the departments in your organization.
Your CEO's enthusiasm can be contagious. Ask him or her to write a personal letter of support to all employees (see example on page 10).

Step # 3: ANALYZE CAMPAIGNS/SET GOAL

Setting a realistic campaign goal can motivate and encourage participation. Talk with last year's Campaign Coordinator. Find out what worked and what didn't work during last year's campaign. You can also talk with your United Way representative who can help with your analysis and goal setting.

Look at past results:

- The number of contributors
- The total amount raised
- The participation rate

Based on what you find, consider setting goals for:

- Total dollars to raise
- Percent of employee participation
- Average gift

Step # 4: DECIDE ON SOLICITATION STYLE

Decide on the best method of approaching fellow employees – group, individual or both.

Group Solicitation: Employees are brought together to hear the United Way message and are then asked to fill out their pledge forms at the end of the presentation. Group solicitations allow for efficient use of time, and because employees hear a uniform message, less follow-up is required.

Individual solicitation: This is a one-on-one ask to an employee for a gift. This style involves more employees but personalizes the campaign and offers you a greater opportunity to answer individual questions (see page 9).

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

Emphasize leadership giving (for personal gifts of \$600 or more) and other recognition levels. Hold a separate group meeting for all management and professional employees to be asked prior to the employee campaign to set the pace.

Step # 5: PROMOTE YOUR CAMPAIGN

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

Visit United Way of Henry County & Martinsville's website at www.unitedwayofhcm.org for more campaign ideas.

Use employee newsletters, e-mail and other in-house communication tools.

Use United Way posters and brochures to build awareness of the upcoming campaign. See supply order form for supplies available at no cost.

Increase employee awareness by creating competition between departments. Prizes and incentives can also create interest. Order items from the United Way catalog.

Step # 6: EDUCATE

Use speakers and agency tours to show how United Way dollars are at work.

Visit www.unitedwayofhcm.org to find information to share with fellow employees.

Schedule your campaign and book your speaker and/ or tours early!

Step # 7: CONDUCT THE CAMPAIGN

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

Make a gift yourself. It is easier to ask others to give when you are giving

Use personalized pledge forms, when possible, to make sure everyone has an opportunity to contribute.

Get help from payroll, data processing and department heads.

Make sure every employee is asked to give. Don't forget employees who work off-site, travel extensively or are on alternate shifts.

Step # 8: REPORT RESULTS

It is very important to report results to United Way as soon as possible. For large employee groups weekly partial reports are recommended, with a final report following the completion of your campaign. Call your United Way representative if you have questions.

Weekly partial reports allow United Way to cash personal checks in a timely fashion.

Make sure all pledge forms are returned and accounted for.

Forward copies of all payroll deductions forms to your company's payroll department.

Summarize all campaign information on the Report Envelope.

Enclose cash, checks and copies of all pledge forms.

If your organization uses its own pledge forms, to ensure you and your co-workers are recognized for participation, please provide a summary of your campaign on the United Way of Henry County and Martinsville report envelope and return it to your United Way representative.