

# 10 STEPS TO PLAN YOUR UNITED WAY CAMPAIGN

LIVE UNITED

United Way fights for the health, education, and financial stability of every person in the Greater Lafayette Community. We find our communities most daunting issues. We surround them with resources and we fight! But we are more than the fund-raisers. We are the hand raisers. The game changers. The stop-talking-start-doing-band-together-and-take-on-the-impossible-task-masters. United, we stand up for quality education for all children. United, we confront the struggles of working families. United, we stand with those battling mental health challenges. United, we fight to overcome barriers to employment. Because change doesn't happen alone. Hope isn't a one man band. And there's no such thing as being self-taught or self-made. We have one life to live. To live better, we must Live United®.

## 1 SHARE YOUR STORY Why do you give—*What do YOU fight for?*

## 2 ANALYZE PAST CAMPAIGN RESULTS & DETERMINE YOUR GOAL

- Review your campaign report for past campaign techniques: participation level, average gift, per capita giving and percent of potential achieved
- Ask: What are opportunities for improvement? What goals can I set to make that happen?

## 3 SECURE TOP-LEVEL SUPPORT

- Important things your CEO can do to ensure your success:
  - announce your role as the Employee Campaign Coordinator
  - approve company time for campaign meetings, training, rallies, tours
  - send a letter or email to all employees encouraging their participation
  - appear at campaign meetings, rallies, and special events to make a personal endorsement
  - consider a corporate match

## 4 FORM A PLANNING COMMITTEE

- Recruit committee members from all segments of your organization
- Establish a goal for the upcoming campaign based on last year's report (*contact United Way to discuss and help plan*)
- Include past committee members and people with special talents (*marketing, personnel, communications, etc.*)
- Establish a calendar of events with promotions and campaign dates
- Run your campaign in one to two weeks
- Consider an incentive program to encourage participation
- Consider inter-department competition
- Conduct follow-up solicitation—ensure each employee is contacted and a pledge card is returned

## 5 HAVE A CAMPAIGN KICKOFF AND INVITE UNITED WAY

- Schedule the kickoff during your company's weekly or monthly meeting
- Your kickoff might include:
  - campaign overview, plans, time frame, special events, and incentives
  - endorsement by management and labor *(if applicable)*
  - testimonials by employees who have benefited from United Way services
  - United Way staff, video, and speakers
  - a pledge request—employees may be asked to complete pledge forms at this time
  - food, activities—the more fun, the better

## 6 PROMOTE AND EDUCATE

- Host a Lunch and Learn and invite United Way to speak
- Offer tours for a first-hand look at who United Way of Greater Lafayette helps
  - United Way staff will arrange these for you around company and employee schedules
- Utilize bulletin boards, newsletters, and other internal communications to engage and educate employees all year
- Chart campaign progress in high traffic areas to keep employees informed
- Consider special events for Vanguard Donors

## 7 IMPLEMENT THE CAMPAIGN PLAN

- Share a calendar of events with top management so they can release employees for meetings and tours
- CEO should encourage executives to provide visible support in their departments

## 8 REPORT RESULTS PROMPTLY

- Campaign wrap-up is important
  - ensure all pledge cards are returned and signed
  - complete the campaign report envelope
  - deliver copies of completed pledge forms to your payroll/accounting department
  - deliver *(or arrange pick up with United Way staff)* the completed report envelope and original pledge forms by November 16, 2015 for on-time tax receipts to employees

## 9 SAY THANK YOU!

- Send letters to your campaign team thanking them for their efforts
- Ask CEO to send a letter thanking employees for their support and participation
- Display your final results in visible workplace locations
- Recognize significant department achievement
- Have a celebration such as an ice cream social, pancake breakfast, pizza party, or cookout

## 10 UTILIZE NEW HIRE AND RETIREE PROGRAM

- Year-round solicitation of new employees and retirees reduces campaign loss
- Meet with your company's human resources department to make this a part of the new employment and post-employment processes

**THE #1 REASON WHY PEOPLE DON'T GIVE IS BECAUSE THEY ARE NOT ASKED**