

## Steps to Running a United Way Campaign

*We have created a quick guide to running a successful campaign whether you are new or seasoned campaign manager.*

### **STEP 1: Recruit Your Team**

- Compose a team of people throughout your organization that involves different departments and positions.
- Work to get management and executive support as this will help encourage overall staff involvement.

### **STEP 2: Strategic Planning**

- **Campaign Dates** - When will you hold your campaign? How long will your campaign run - start and end date? When will you begin promoting your campaign? Are you able to do both print and digital communications?
- **Goal** - What is the total goal for your campaign? Do you have a dollar \$ amount, participation %, or another numeric goal you wish to strive for? Do you have different departments with a different goal?
- **Company/Corporate Involvement** - Will your company be able to match the employees' contributions? Would your company sponsor giveaway prizes or incentives for employees to give?

### **STEP 3: Plan Activities for the Employees**

- **Agency Tours** - Request a tour of one of our partner agencies. See first hand where donations go. Tours typically last one (1) hour which includes travel time.
- **Speakers** - Did you know you can request an agency or United Way speaker for your next team or department meeting? Speakers help connect the dots between a donation and the true local impact.
- **Events or Fairs** - Would you like to have an educational agency fair at your workplace? We can schedule several agency partners and United Way to be in

attendance to engage your employees and educate them on the importance of their donations.

[Contact us](mailto:resourcedevelopment@uwcsra.org) at [resourcedevelopment@uwcsra.org](mailto:resourcedevelopment@uwcsra.org) to set up one of the above activities!

#### **STEP 4: Ways to Give**

- **Confirm Your Company's Preferred Donation Method** - We offer convenient ways to donate such as:
  - Payroll deduction through our pledge forms
  - Online giving through our website
  - *NEW!* Custom workplace donation pages (United Way will build a page custom to your needs)
  - "Text-to-Give" mobile giving
- **Explain Our Donation Options Fully** - With having several ways to make a donation, you do not want to confuse your workforce. No matter which method(s) you choose for your campaign, make sure to provide concise and easy-to-understand instructions. Our team is available to help create these instructions for you.
- **Make It Easy** - Consider placing pre-printed labels (with the employees' levels of giving or fair share option) on pledge forms for faster consideration and processing.
- **Special Events** - We find that workplaces have a more successful campaign when they create special events such as raffles, games, contests, and more to generate donations.

#### **STEP 5: Promote Your Campaign & Have Fun**

- **Create a Communication Plan** - It is very important that your entire workplace, all departments, and even contractors, receive communications about your campaign timeline, events, progress, and overall goal. We recommend considering the following:
  - Sending daily or at least weekly emails (if you run a longer campaign) to your entire workforce.
  - Ask management and executives to create their own email communications as additional reinforcement and encouragement.

- Ensure you have enough printed materials (brochures, annual reports, posters, etc.) to pass out to your staff for your entire campaign timeframe. Contact us to request these materials, or view the Campaign Toolkit for emailable/printable versions.
- **Take Photos & Videos** - Not only do we want to see you having fun during your campaign events, your employees like to see what is going on too! Share your photos and videos with your staff internally and then with us by emailing them to [info@uwcsra.org](mailto:info@uwcsra.org)

## **STEP 6: Share & Thank**

- **Share the Results** - Communicate your campaign progress and overall totals. Don't be afraid to share how these donations will impact the lives of local residents across the CSRA. We have success stories available online that you can share with your office.
- **Thank Your Staff** - Thank you notes, emails, and verbal conversations go a long way. Be sure to thank everyone who gave their time, talent, sources, and donations. You may even want to host a thank you event!