

CAMPAIGN BEST PRACTICES

- 1 BUILD A RELATIONSHIP WITH UNITED WAY STAFF**

Meet with United Way staff to help you assess the strengths of last year's Campaign and suggest areas for improvement. Ask for information about additional recognition opportunities.
- 2 SECURE TOP-LEVEL SUPPORT**

Involve your CEO in all initial planning. Discuss budget, corporate gifts, and CEO involvement throughout the campaign.
- 3 DEVELOP A PLAN AND SET GOALS**

Plan your campaign timeline, budget, and design your campaign. Be creative and set achievable goals.
- 4 ORGANIZE A TERRIFIC TEAM**

Recruit a committee to help. Involve friendly and outgoing employees from ALL levels and departments of your company who will build excitement for the campaign and make sure that everyone is asked to give.
- 5 PROMOTE AND PUBLICIZE THE CAMPAIGN**

Share how, where, and when to pledge and incentivize giving. Utilize and distribute United Way campaign materials.
- 6 MAKE THE ASK: EMPLOYEE MEETINGS OR ONE-ON-ONE**

Include new hires, current staff and leadership, and retirees in the asking process by providing them with pledge forms. This is the most important step. The number one reason employees don't give is because they were never asked.
- 7 PROMOTE LEADERSHIP GIVING**

Encourage and recognize levels of Leadership gifts with peer-to-peer solicitation and personal asks. Successful campaigns have heavy involvement from leadership, setting an example of participation from the top down.
- 8 WRAP UP & REPORT OUT**

Announce your final results to your organization and your local United Way in a timely manner and thank everyone involved! Determine how you will collect all the completed pledge forms and check for accuracy.
- 9 RECOGNITION & THANK YOU**

Sponsor a breakfast, luncheon, build your own sundae bar, or reception to thank employees. Those two simple words not only show appreciation, but also set the tone for year-round communication and next year's Campaign.
- 10 YEAR-ROUND ENGAGEMENT**

Learn more about what it means to LIVE UNITED at unitedwaynela.org. Invite United Way staff to employee engagement functions year-round, if appropriate.