

# CHECKLIST FOR A SUCCESSFUL CAMPAIGN



## 1. Getting Started

- ◆ Attend United Way of Paducah McCracken County Campaign Coordinator training.
- ◆ Know your organization's United Way history. Talk to last year's coordinator and find out what worked and what didn't work.

## 2. Enlist Support

- ◆ Secure top level management support by asking your CEO to commit to one or more of the following:
  - To ensure a succession planning, ask your CEO to appoint next year's coordinator to help you.
  - Ask your CEO to encourage donors by providing incentives for giving.
  - Find out if your company has a matching gifts program.
  - Encourage your CEO to speak about the benefits of giving to United Way at your employee group meetings or write a letter of support
  - Recruit a committee representative of different departments in your organization.
  - Remember the benefits of **TEAM— Together Everyone Accomplishes More**
  - Clearly define the role of your volunteers and how much time they will commit to the campaign.

### What Makes a Great Committee Member?

- ♥ Enthusiasm
- ♥ Knowledge of and belief in United Way
- ♥ Well respected
- ♥ Willing to set an example by giving to United Way

- ◆ Arrange for support and materials from United Way.
- ◆ A United Way volunteer or staff member is available to help you. Here are a few ways a campaign volunteer, a loaned executive, or United Way staff can help:
  - Provide campaign materials, information and support.
  - Make presentations in your employee meetings.
  - Arrange for an agency speaker, agency fair, or agency tours.
  - Plan and implement your campaign.

## 3. Decide on a 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 then are asked to fill out their pledge cards at the end of the presentation. Group solicitation allows for best use of time, a uniform message, and less follow-up.
  - **Individual Solicitation:** This is a one-on-one ask for an employee to make a gift. This style requires more volunteers but personalizes the campaign and gives you the opportunity to answer individual questions.
  - **Both:** Hold one group meeting or a series of group meetings and use the one-on-one method as a means of follow-up for those who couldn't attend a group session.

## Advantages of Group Meetings

- **Flexibility:** The group meeting can be adapted to work successfully in any organization's schedule; a 15-minute United Way presentation can be incorporated into a staff or department meeting.
- **Efficiency:** The campaign can be completed in two weeks or less with a minimal amount of production time.
- **Effectiveness:** The positive spirit and educational approach of the group meeting fosters a greater spirit of giving in a greater number of people.
- **Consistency:** The United Way message is presented in a consistent manner to the workforce.

## 4. Set Clear Goals and Develop a Campaign Plan

◆ Analyze past campaigns and set realistic goals. Set an increase based on one or more of the following areas:

- **Percent Participation:** Divide the total number of givers by the total number of employees to get your percent participation. United Way recommends setting a goal of 100% solicitation instead of 100% participation to give everyone an opportunity to give.
- **Dollars Raised:** Consider raising your dollar goal by a percentage over the previous year's goal. Be sure to include your employer's corporate gift in total amount raised.
- **Average Employee Gift:** Determine your company's average gift by dividing your total campaign by the number of givers.
- **Per Capita Gift:** This amount is calculated by dividing the total campaign amount by the total number of employees.

## 5. Promote Your Campaign

- ◆ Use United Way brochures, posters, and thermometers to build awareness of the upcoming campaign. United Way provides these at no cost to your organization.
- ◆ Try placing United Way information in unexpected places, such as on the back of restroom stall doors or in employee pays envelopes.
- ◆ Promote and publicize your campaign in employee newsletters, e-mail and other in-house communication tools.
- ◆ Increase employee awareness by creating a little friendly competition among departments.
- ◆ Prizes and incentives can also create interest. If you have a budget, you can order items from the United Way catalog.

## 6. Educate Your Employees about Your Local United Way

- ◆ **Campaign Videos and DVDs:** A great addition to your United Way employee meetings. Videos have been produced locally and highlight people who have been helped right here in our own community.
- ◆ **Speakers:** Recipients of program services can tell you personal stories about the impact of United Way on their lives. Agency representatives can tell you about the programs their organizations offer.
- ◆ **Tours:** Encourage your employees to get a firsthand look at agencies and the services they provide by participating in a tour of two or more agencies.
- ◆ **Personal Testimonies:** Whether we realize it or not, most of us have been touched by a United Way agency. Some of your co-workers may be willing to share their own personal stories.