

CAMPAIGN BASICS

10 Steps to Success



United Way
of Southwest Minnesota

Running a successful United Way campaign can be fun and easy. The most successful Campaign Ambassadors have found the following tips to be instrumental in their efforts.

1. Get Resources

- Contact United Way of Southwest Minnesota to learn how we can assist you.
- Visit our website for in-depth ideas and access to campaign resources.
unitedwayswmn.org – Campaign Toolkit – Ambassador Resources

2. Obtain Top Management Support

- Talk to your company's leadership about approving a campaign committee and budget, as well as allowing use of company time for campaign meetings, activities and, maybe, incentives.
- Ask top managers to publicly support, endorse and participate in the campaign and events.
- Discuss the possibility of matching a percentage of employee investments with a corporate contribution.
- Develop a strategy for engaging other company leaders, possibly through the use of a separate leadership campaign.



3. Recruit a Strong Campaign Committee

- Build a campaign team that is diverse and includes individuals from multiple departments and every level within the organization.
- Involve co-workers who have been helped or had prior involvement with United Way on your team. They are a great addition and can speak from personal experience during the campaign.
- Invite a United Way of Southwest Minnesota representative to your campaign planning meetings to answer questions and offer ideas.

4. Develop your Campaign Plan

- Set a campaign timeline. Most campaigns run in the fall and last about two weeks. However, campaigns can take place any time during the year.
- Set a campaign goal. Identify some areas for improvement and set some measurable goals to achieve. Measurable goals could include: an increased dollar goal; increased participation; and/or increased average investment. Talk to a United Way of Southwest Minnesota representative for more help in identifying your campaign goals.
- Identify campaign responsibilities and which team member(s) will be responsible for them; who will be in charge of distributing and collecting pledge forms, the campaign events, and incentives?
- Consider some incentives that can be used to entice new donors and encourage existing donors to increase their contributions (by \$1/week or 1% of salary).
- Choose campaign strategies and approaches that fit your company culture.

5. Promote and Prepare



- Promote the campaign with posters, flyers and photographs. (**Find samples online!**) Include campaign communications in company newsletters and through a memo from the CEO.
- Work with United Way of Southwest Minnesota to ensure that you have pledge forms, campaign one-pagers and all other necessary campaign materials for your campaign.
- Send a weekly or daily United Way of Southwest Minnesota email during the campaign with United Way of Southwest Minnesota facts. (**Hint: There are sample communications online!**)
- Announce the campaign at various department and staff meetings.
- Conduct employee presentations.
- Hold Special Events! (**You guessed it, you'll find ideas online!**)

6. Campaign Kick-Off & Leadership Giving

- Make your personal investment in United Way of Southwest Minnesota before the campaign begins so you don't forget!
- Invite all staff to a kick-off event that communicates management support, campaign goals & activities.
- Invite a United Way of Southwest Minnesota representative to speak at the kick-off and/or other campaign events.
- Set specific Leadership Giving goals. Thank those who have been Leadership Givers in the past.



7. Make the Ask: *Every Person. Every Community.*

- Make sure that everyone is asked to give through the kick-off, department meetings and through one-on-one conversations. ***The number one reason people say they didn't give to the campaign is because they weren't asked!***
- Have the campaign committee personally distribute pledge forms and ask co-workers to join them in their support of United Way of Southwest Minnesota. Be prepared to talk about why you support the work of United Way of Southwest Minnesota
- Show donors the impact that their individual contribution makes. Giving goes up when people know their gift is making a real difference.
- Be prepared to answer questions about United Way of Southwest Minnesota to help employees know how United Way works. If you need help with an answer, contact our office.
- Tell employees when the campaign ends, where to turn in their forms and how they can get more involved.
- **Say THANK YOU!**

8. Monitor and Report Your Progress

- Keep a running total as the pledges are collected. Compare against the goals identified by the campaign committee.
- Provide regular progress updates to employees.
- Hold a mid-campaign review to check the progress towards your goal. Identify any possible interventions.
- Make personal follow-ups with individuals who have not turned in their pledge form.

9. Campaign Wrap-Up

- Collect pledge forms and donations from employees. Deliver them to United Way of Southwest Minnesota office. **NOTE: Once again the pledge forms are a one-part form. You can either make a copy of the forms and bring those to the United Way office, or bring the original pledge forms to our office and we will make copies for our records.**
- Complete an Employee Campaign Report with each submission of cash and/or checks.
- Re-solicit last year's donors who have not yet pledged, identify givers near Leadership Giving level and ask them to consider increasing their investment to reach the next leadership level.
- Report your final total to employees and company leadership.
- Hold a final campaign committee meeting to evaluate your efforts.

10. Thank Everyone! Celebrate!



- Thank everyone! Send thank you emails, a thank you memo from the CEO, hang thank you posters.
- Don't forget to send a special thank you to the campaign committee!
- Share United Way of Southwest Minnesota updates and news with employees year-round so that they can see the impact of their contributions.
- Arrange a United Way volunteer project to further engage employees.
- Use new hire and retiree packets to introduce new employees to the work of United Way of Southwest Minnesota.
- Allow retirees to continue their involvement. Contact United Way of Southwest Minnesota for more information.

Ways to “Make the Ask”

Group solicitation, followed up by peer to peer solicitation are the most effective and efficient ways to campaign. It assures that the maximum amount of consistent information reaches all employees.

Experience shows that the best results are achieved when “the ask” is made during an already scheduled meeting. Also, consider segmenting your group solicitation efforts by employee divisions (i.e., key management, hourly, etc.). This allows you to target your message.

Recruit enthusiastic, responsible people representing the key areas of your organization to help with solicitation. Give the solicitors the information and motivation needed to do the job right.

Make it FUN!



Solicitor Best Practices

Know Your Facts!

Study the campaign materials and resources. Learn as much about the United Way of Southwest Minnesota as you can.

See Your Prospects In Person!

Personal contact is the way to solicit. If your prospect is not available, do not leave materials with a note. Return to see him or her later.

Show Enthusiasm and Confidence!

Attitude creates a strong impression and enthusiasm is contagious.

Always Say Thank You!

A little courtesy goes a long way.