

UNITED WAY OF SOUTHWEST MINNESOTA

Campaign Basics – Step by Step

10 Steps to Success

Running a successful workplace campaign for United Way of Southwest Minnesota (hereafter UWSWMN) should be fun and easy. The most successful campaign ambassadors have found the following tips to be instrumental in their efforts.

1. 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. Examples: Corporate will donate 50 cents for every \$1 donated by employees; \$1 to \$1 match; 15 cents for every \$1, etc.
- Develop a strategy for engaging other company leaders, possibly through the use of a separate leadership campaign.

2. Get Ambassador Training and Obtain Campaign Resources

- There are options for ambassador training and distribution of campaign resources for the 2022 Campaign. Group trainings will be held on Thursday, September 15 at 10 a.m. and also at 4 p.m. at the UWSWMN office. You also have the option to schedule a one-on-one session (for you and your team) by contacting Meg at Meg.Louwagie@UnitedWaySWMN.org.
- Visit our website for in-depth ideas and access to campaign resources.

unitedwayswmn.org/ambassador-resources



3. Recruit a Strong Campaign Committee

- Build a campaign team that is diverse and includes individuals from multiple departments and every level within the company.
- Involve co-workers on your team who have been helped by or had prior involvement with UWSWMN. They are a great addition and can speak from personal experience during the campaign.
- Invite a UWSWMN 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 and can be as short as one day.
- Set a campaign goal. If you've had an employee campaign previously, consider identifying 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 UWSWMN 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, planning campaign events, and arranging for incentives?
- Consider some incentives that can be used to entice new donors and encourage existing donors to increase their contributions (for example by \$1/week or 1% of salary).
- Choose campaign strategies and approaches that fit your company culture.

5. Promote Your Campaign and Prepare for SUCCESS

- Promote the campaign with posters, flyers and photographs. (**Find samples online!**)
- Include campaign communications in company newsletters, emails, social media, and through a memo from leadership.
- Work with UWSWMN to ensure that you have pledge forms, campaign one-pagers and all other necessary campaign materials for your campaign. You can also access materials from our website.

- Send a weekly or daily UWSWMN email or text during the campaign with UWSWMN 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. Hold a Campaign Kick-Off & Encourage Leadership Giving

- Make your personal investment in UWSWMN 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 UWSWMN 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. Educate Co-workers and Make the Ask

- 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 UWSWMN. Be prepared to talk about why you support the local work of UWSWMN.
- 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 UWSWMN 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 co-workers.
- 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. Wrap-Up Your Campaign

- Collect pledge forms and donations from employees. Make sure that all payroll deduction pledge forms are presented to your HR department or payroll personnel. Deliver pledge forms (or copies) to the UWSWMN office. **NOTE: You can either make a copy of the forms and bring those to the UWSWMN office, or bring the original pledge forms to our office and we will make copies for our records.**
- Complete a Workplace Campaign Report with each submission of pledge forms, 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.
- Verify corporation donation/match and submit with your report form.
- Report your final total to employees and company leadership.
- Hold a final campaign committee meeting to evaluate your efforts.

10. Thank Everyone and Celebrate!

- Thank everyone! Send thank you emails, a thank you memo from the CEO, hand written thank you notes and/or hang thank you posters.
- Don't forget to send a special thank you to the campaign committee!
- Share UWSWMN updates and news with employees year-round so that they can see the impact of their contributions.
- Arrange a volunteer project to further engage employees (**click the 'Volunteer' tab on the UWSWMN website**)
- Use new hire and retiree packets to introduce new employees to the work of UWSWMN.
- Allow retirees to continue their involvement. Contact UWSWMN 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!



Ambassador Best Practices

Know Your Facts!

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

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.