

## **10 Steps to Planning a Successful Campaign**

Careful planning leads to successful campaigns. These steps will help you prepare an effective campaign. We're confident you'll meet your campaign goals if you follow the suggestions below.

### **1 - Get to Know Cedar Valley United Way**

- Attend our Rally For The Valley Event in August
- Explore the Cedar Valley United Way website at [www.cedarvalleyunitedway.org](http://www.cedarvalleyunitedway.org)
- Familiarize yourself with the CVUW mission, initiatives, and partner agencies and programs
- Get to know our partner agencies by contacting them and taking a tour, and /or volunteer for Day of Caring to see first-hand how your donations help people in need

### **2 - Start at the top – Involve your CEO**

- Meet with your CEO to discuss the objectives of the campaign and the employee goal
- Ask your CEO to allow you time for training, UW representative presentations to your coworkers, and to recommend a Leadership Giving Chair
- Ask your CEO to speak about his/her support at a meeting with top managers and employees, and to communicate that support to employees through a letter or email
- Identify incentives and a budget for incentives and prizes for your CEO to approve

### **3 - Develop a Strong Campaign Team**

- Involve individuals from as many levels and divisions of your organization as possible
- Assign specific tasks to each committee member such as Marketing/Communications, Kickoff Event, Incentives, Leadership Giving, Group Meetings/Presentations, Pledge Forms, and Thank You Event
- Hold a training session for your team conducted by your United Way staff or Loaned Executive

### **4 - Gather and Evaluate Information**

- Evaluate prior year's campaign to learn: management support, campaign team composition, internal communications, events, and incentives
- Review Past campaign results to learn: total number of employees, total amount pledged, average employee gift, percent of participation, total number of Leadership Givers

## **5 - Set Campaign Objectives**

- Increase average gift from \_\_\_\_ to \_\_\_\_
  - Strategies to increase average gift: introduce Leadership Giving, link incentives to increasing average gift
- Increase participation from \_\_\_\_ to \_\_\_\_
  - Strategies to increase participation: 100% presentation attendance goal, conduct group meetings, one-on-one solicitation, link incentives to participation
- Based on the above, determine your Campaign Goal

## **6 - Promote the Campaign**

- Use your in-house newsletter or other forms of company communications to promote the campaign and be sure to highlight the campaign team members so those with questions know who they can approach
- Display United Way posters and materials throughout the building
- Hold special events and contests
- Educate employees about CVUW and update them on the progress of the campaign
- Link your intranet and company website to [www.cedarvalleyunitedway.org](http://www.cedarvalleyunitedway.org)
- Use the tools, tips and techniques provided and request promotional materials from CVUW
- Wear your LIVE UNITED T-shirt!

## **7 - Conduct a Leadership Giving Program**

- Ask selected employees to give \$1,000 or more (\$500 or more for those under the age of 40) through a Leadership Giving campaign
- Important elements of a Leadership Giving campaign include: active support and commitment of CEO, designated Leadership Giving Chair, Leadership Giving group meetings, follow-up after Leadership Giving group meetings, special Leadership Giving events (i.e. breakfast, reception, etc.)

## 8 - Ask for Contributions

- The most important step in your campaign is asking your employees to give to United Way. Even though you may have a well-planned campaign with many exciting events, if employees are never asked to give, it will not be successful. Your United Way campaign contact can help you with one of the time-tested methods below.
  - **Group Presentations** are the best way to increase understanding on the difference a gift to Cedar Valley United Way makes in people's lives and in our community. After bringing employees together in small groups to hear an agency or United Way speaker and receive information, they are asked to make a pledge. The format of a group presentation can be tailored to meet your company's needs. A presentation could be scheduled during a regularly scheduled employee meeting to reduce disruption of work schedules.
    - Encourage employees to complete and return their pledge forms at this time
    - Offer incentives to those who turn them in at the meeting or in a timely manner
  - **Benefits of Group Presentations:** requires fewer one-on-one presentations and follow-ups, campaign team can present an organized program, employees receive high quality information on which to base their decision, it allows employees to make an individual decision in a pressure-free environment, surveys indicate that group presentations encourage employees to give more, and even more importantly, they help contributors to feel good about their gifts and themselves
  - **One-to-One presentations** can be used as a personal approach to each donor, and are useful in conjunction with group presentations to reach all employees, or when a company is unable to conduct a group presentation.
    - Share enthusiasm & facts about Cedar Valley United Way
    - Answer questions
    - Ask for donation

## 9 - Report Campaign Progress

- Regular reporting to employees, team members and the United Way helps keep people involved. Reports could include things such: total number of donors to date, total dollars raised to date, number of Leadership Givers, reminder about outstanding pledge forms, reinforcement of pledge return deadline

## 10 - Say Thank You

- Everyone who participates in your campaign should be thanked
  - CEO
  - Contributors
  - Campaign Team
  - Leadership Giving Coordinator
  - Yourself, for making a difference in our community!

Please Remember....

- The Cedar Valley United Way Campaign is voluntary. The most responsive contributors are those who have the opportunity to become informed and involved. Well-planned campaigns with an effective communications program, conducted by committed volunteers, will ensure responsive contributors. Not only does pressure hurt the contributor, it hurts the cause as well.
- The following are a few reminders to ensure that participation in your United Way campaign is voluntary:
  - Giving is a personal matter, and should be kept confidential. Use incentives, fun and information to get more positive results. Employee giving should not influence personnel decisions (i.e. compensation, promotions, etc.)
  - A campaign objective which is based solely on 100% participation in an employee campaign can create a perception of pressure, real or implied. Be sure to communicate that 100% participation is only a GOAL, not a requirement.
  - Although top management support is invaluable to your campaign, have peers rather than superiors do individual solicitations.
  - Make sure employees know that acts of coercion in any form are unacceptable.