

LIVE UNITED™



Campaign Best Practices: Steps to Success

1. Get to know your United Way Development Manager

- a. Meet your United Way Representative
- b. Review United Way materials
- c. Share and exchange ideas

2. Know your organization's giving history

- a. Total employee dollars raised
- b. Percent participation & average gift
- c. Total corporate dollars contributed (if applicable)
- d. Number of Leadership Givers (\$1,000+), Women in Philanthropy Givers, Emerging Leaders Givers & Tocqueville Society Givers (\$10,000+)
- e. Special events held

3. Obtain support

- a. CEO and senior executives
- b. Committee volunteers who represent various departments
- c. United Way representative

4. Develop a campaign plan

- a. Set clear goals
- b. Decide on a solicitation style
- c. Create a Leadership Giving program
- d. Promote campaign and special events
- e. Host kick-off event/meeting

5. Educate employees

- a. Hold group meeting(s) and Leadership meeting(s)
- b. Show United Way video
- c. Participate in a volunteer project
- d. Invite a United Way speaker

6. Promote Leadership Giving

- a. Enlist support early
- b. Develop a plan to identify & cultivate potential leadership givers

- c. Host a leadership giving event to promote and set a precedent
- d. Recognize and publicize results

7. Ask employees to give

- a. Include CEO "Ask" letter with personalized contribution form
- b. Solicit current and potential Leadership Givers
- c. Distribute personalized contribution forms
- d. Collect completed pledge forms at end of meeting
- e. Send "Did You Know" or "Success Story" emails
- f. Announce percent to goal achieved
- g. Final deadline and goal reminder

8. Say Thank You!

- a. Post thank you posters
- b. Send a personalized thank you letter
- c. Publicize final results
- d. Recognize campaign committee members

9. Report results

- a. Gather all completed pledge forms
- b. Contact your United Way representative
- c. Schedule a meeting to review and tally final totals
- e. Submit a copy of each contribution form to your payroll department

10. LIVE UNITED All Year Long!