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!