

# 10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN

## 1 CEO CONTACT

Involve your CEO in all initial planning. Discuss budget, corporate gifts, and CEO involvement throughout the campaign.



Recruit a committee to help, set your timeline & budget, and design your campaign. Be creative.

## 2 RECRUIT

Identify your campaign activities. Delegate tasks to your committee.



Evaluate past campaign performance and calculate a goal. United Way can help, especially when it comes to incorporating new ideas.

## 3 REFLECT



## 4 SET GOALS

Discuss the hard numbers and where you want to grow your campaign. Create non-monetary volunteer opportunities.



Tip: Creating volunteer opportunities encourages everyone to get involved. Use of [volunteermtc.org](http://volunteermtc.org) can help with opportunities that align with your company's mission.

## 10 HAVE FUN

Engage your employees with fun AND meaningful activities, prizes, and volunteer opportunities.



## 5 PUBLICIZE

Share how, where, and when to pledge and incentivize giving.



Order Live United shirts- they create a great photo opp!  
Utilize and distribute United Way campaign materials.

## 6

## 6 CONDUCT CAMPAIGN

Distribute campaign materials and host a United Way speaker.  
Invite guests speakers from United Way.  
Create learning opportunities through educational campaign activities.



## 7 LEADERSHIP GIVING

Recognize leadership gifts and discuss CEO matched donations.



Tip: Successful campaigns have heavy involvement from leadership, setting an example of participation from the top down.

## 9 REPORT & THANK

Announce your final results to your organization and your local United Way in a timely manner and thank everyone involved!



## 8 ASK

Include new hires upon arrival, current staff and leadership, and retirees in the asking process by providing them with pledge forms.



United Way of Marion and Taylor Counties