

1

START AT THE TOP

Get your CEO involved in campaign planning and discuss budgets and potential corporate support.



2

SET GOALS

Evaluate your past campaigns, determine where you want to grow this year and set your goals.

Pro tip: Your United Way rep can help with this!



3

PLAN AHEAD

Set your timeline and budget early to make it easier to identify campaign activities and delegate tasks to a committee. (see #4)



4

GET HELP

Recruit a committee to help plan events, coordinate emails, hand out materials and think of new fundraising ideas.



5

GET THE WORD OUT



- Share how, where and when to pledge and incentivize giving
- Plan emails from your CEO and co-workers who want to share why they donate

10

HAVE FUN!

Get your face messy during the pie eating contest and show off your bowling skills during your United Way bowling tournament. Make sure you (and your co-workers) have fun during the campaign!



10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN

10

9

THANK & REPORT

Thank your committee, CEO, leadership team and donors for their support and let them know how much you went over your goal (or how close you came!).



8

ASK

Include leadership, new hires, staff and retirees by providing them with a pledge form or a link to pledge online. Worried about asking co-workers to give? Don't forget . . . you're not asking for you—you're asking for thousands of local people in need.



7

LEADERSHIP GIVING

Recognize your leadership donors with a special kickoff or reception and encourage your leadership-level staff to pledge early to show their support and set an example.

Pro tip: Successful campaigns have high involvement from the CEO and leadership team.



CAMPAIGN TIME!

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- Hold a kickoff meeting (party time!)
- Distribute materials and show the campaign video
- Create opportunities to learn more about United Way's Community Fund

INVEST. CONNECT. SERVE.

