

CAMPAIGN TOOL KIT



For more samples and ideas, see the Little Book of Big Ideas on our website: <https://www.uwswac.org/little-book-big-campaign-ideas>

1. RECRUIT A TEAM

- Attend United Way Campaign Training
- Meet with United Way Loaned Executive to review prior year's giving (United Way Loaned Executive will provide this for you) and develop a campaign strategy
- Meet with your CEO to confirm commitment and buy-in to engage employees
- Recruit a committee to help with specific campaign tasks
- Schedule an internal training for your team
- Schedule a United Way meeting with your staff contact

2. SET A GOAL

- Establish your campaign goals - total dollars raise, percent participation, special events, etc

3. DETERMINE YOUR TIMELINE

- Establish your campaign timeline, including a kickoff date, special events, and finale or thank you event, use our Workplace Campaign Timeline Checklist.

4. PLAN CAMPAIGN ACTIVITIES

- Draft a letter to be sent from the CEO to thank employees - see our examples online for help
- Kick off your campaign with a celebration
- Schedule employee meetings and invite United Way Campaign Chair
- Personalize your campaign
- Determine the type of ask that best fits your organization's culture

5. INFORM AND ASK

- Publicize and continuously promote your campaign and your goals to all employees
- Conduct a leadership giving campaign
- Follow up with employees who are unable to attend meetings
- Issue progress reports to United Way and your fellow employees

6. THANK EVERYONE

- Announce your results
- Thank your committee, volunteers and employees for their participation
- Have a celebratory Thank You or Finale event

7. REPORT RESULTS

- Add up your results and submit report envelope and required forms to United Way
- Evaluate your company's campaign strengths and weaknesses and make recommendations for next year's campaign

8. STAY IN TOUCH

- Pat yourself on the back for a job well done!
- Attend the United Way Campaign Thank You Celebration and be recognized for your hard work