

# Steps to a Successful Campaign

## Lay the Groundwork

- \_\_\_\_\_ Review past campaigns and meet with previous coordinators to discuss successful strategies.
- \_\_\_\_\_ Meet with your CEO—authorize payroll deduction, allow time for training and presentations, discuss goals and secure support of management.
- \_\_\_\_\_ Recruit campaign committee, learn about United Way & assign duties.

*Tip: Select committee members from as many parts of the organization as you can. Your corporate culture may be different in different departments.*

## Develop a Campaign Plan

- \_\_\_\_\_ Create a detailed timeline or calendar.
- \_\_\_\_\_ Set goals to increase employee awareness, average gift, leadership givers and participation.
- \_\_\_\_\_ Develop an incentive plan to support objectives.
- \_\_\_\_\_ Request materials from United Way.
- \_\_\_\_\_ Plan kick off event, activities, special events, raffles, presentations and closing events.

*Tip: Keep it “short and sweet.” Kick off with enthusiasm, maintain focus and conclude within two or three weeks.*

## Conduct a Strong Educational Campaign

- \_\_\_\_\_ Implement educational and engagement methods: posters, video, speakers, program tours, e-mail, newsletter, etc.
- \_\_\_\_\_ Ensure every employee is educated and asked, don't forget follow up.
- \_\_\_\_\_ Conduct special events, activities, offer incentives.

*Tip: Let United Way know the dates of your events, so staff and Drive Chairs can attend.*

## Report and Recognize

- \_\_\_\_\_ Report results to employees throughout campaign.
- \_\_\_\_\_ Submit necessary forms to human resources.
- \_\_\_\_\_ Identify and thank Loyal Contributors employees who've been giving to any United Way for 10 years or more.
- \_\_\_\_\_ Thank all employees through messages in newsletters, email, bulletin boards, etc.

*Tip: Announce winners of contests and incentives as they happen to encourage more people to get involved.*

## Wrap up Your Campaign

- \_\_\_\_\_ Fill out Report Envelope—Update organization information.
- \_\_\_\_\_ Return completed Report Envelope, forms and money to United Way.
- \_\_\_\_\_ Return Yard Signs and/or DVD/VHS copies to United Way.

If you need help or ideas at any time, visit our NEW campaign center on [www.marshfieldareaunitedway.org/campaign](http://www.marshfieldareaunitedway.org/campaign), call United Way at 384-9992 or e-mail [unitedway@tznet.com](mailto:unitedway@tznet.com).



**Kathy Rhyner,  
Associated Bank,  
Community Bank President**

My passion is reading. I LIVE UNITED by volunteering with Youth Net an hour a month to help children work on their reading skills—and I look forward to when I'll have more time to volunteer.

I learned from my father the importance of approaching each day with the goal of doing my best.

I think it's important to smile—everything we say and do makes an impact on others—you never know what someone else might be going through at the time.

**I don't just wear the Shirt,  
I LIVE IT.**