



**UNITED
WAY**
Mid-South

10 STEPS TO A SUCCESSFUL CAMPAIGN

1

MEET AND ENGAGE THE CEO

- Send a personal letter of endorsement from your president or CEO.
- Have your CEO participate in the campaign kickoff (e.g., give a speech or participate in the first pledge turn-in).
- Discuss your company's corporate gift.
- Develop your campaign budget with CEO approval (Free campaign incentives are available if needed.)

2

RECRUIT A COMMITTEE AND PLAN YOUR CAMPAIGN

- Set a campaign timeline (2–4 weeks is ideal).
- Finalize the budget with the committee.
- Recruit enthusiastic volunteers who will bring energy and ideas to your campaign.
- Plan campaign activities, such as presentations, special events, food, and prizes.
- Ask your United Way representative to coordinate guest speakers and presentations.
- Assign committee responsibilities and establish target completion dates.

3

REVIEW AND EVALUATE PAST PERFORMANCE AND CALCULATE GOAL

- Work with your United Way representative to review your company's three-year giving history.
- Evaluate last year's campaign, including successes and opportunities for improvement.
- Set a realistic campaign goal based on past performance.
- Incorporate new ideas to make this year's campaign engaging and successful.

4

SET EMPLOYEE GOALS

- Establish a fundraising goal.
- Set an employee participation goal.
- Offer volunteer opportunities for employees. (Your United Way representative can help identify meaningful volunteer projects).

5

PROMOTE & PUBLICIZE YOUR CAMPAIGN

- Share how employees can pledge, when to pledge, and how their gifts make an impact.
- Use United Way campaign materials, including posters, brochures, videos, and other resources.
- Send email communications to build awareness of campaign activities and events.
- Create an intranet page with campaign information and a link to uwmidsouth.org.
- Offer incentives to encourage participation.
- Order United Way T-shirts for your campaign committee.



6 CONDUCT AN EDUCATIONAL & INFORMATIVE CAMPAIGN

- Invite a United Way representative to speak at a company-wide meeting.
- Schedule a guest speaker whose story aligns with your company's philanthropic interests.
- If large meetings are not possible, hold presentations for individual departments.
- Ensure every employee receives United Way campaign materials.
- Follow up to make sure every employee has the opportunity to participate.

7 PROMOTE LEADERSHIP GIVING

- Share information about Leadership Giving (\$500+ annually) and any available matching gift opportunities.
- Encourage your CEO to recognize Leadership donors (for example, with a luncheon or other special recognition).

8 ASK EVERYONE TO GIVE

- Personally invite every employee to participate. One of the most common reasons people don't give is simply because they weren't asked.
- Encourage campaign committee members and workplace advocates to reach out to their coworkers.
- Include both active employees and retirees.
- Introduce United Way during new employee onboarding.
- Inform employees about additional ways to support United Way by giving, advocating, and volunteering.

9 REPORT RESULTS AND SAY THANK YOU

- Recognize individuals, teams, and departments that went above and beyond during the campaign.
- Announce campaign results through a message from your CEO and/or a campaign celebration.
- Thank donors at the time they give with a thank-you card or small company gift.
- Create a "Thank You" display featuring campaign photos, posters, and highlights.
- Celebrate your campaign committee with a special thank-you event.
- Collect all pledge forms, complete the campaign report envelope, and schedule pickup with your United Way representative.

10 HAVE FUN!

- Engage employees with activities that highlight United Way's impact.
- Offer prizes or incentives for first-time donors, increased giving, participation milestones, or other campaign achievements.
- Volunteer together as a team to celebrate your campaign and strengthen your community.