

# CAMPAIGN GAME PLAN

Thank you for helping us build a community where all can thrive. Our team is here to help you have a great United Way campaign! Here are some steps to get you started.

## ORGANIZE

Recruit a team to help you lead your campaign.

### MEET WITH YOUR UNITED WAY ACCOUNT MANAGER \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Discuss educational activities and solicitation methods.
- ☐ Get supplies for your campaign.

### SECURE SUPPORT FROM CEO \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Determine a corporate match and donation.
- ☐ Form a budget for incentives, donor recognition, and meeting refreshments.

### RECRUIT A COMMITTEE \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Include reps from each department.
- ☐ Assign roles and responsibilities.
- ☐ Educate your committee about United Way.
- ☐ Schedule committee meetings and invite your United Way Account Manager.

### MAKE A PLAN \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Review your campaign history and set goals. Your United Way Account Manager can help you. Share your goals with your CEO.
- ☐ Establish a timeline for your campaign. Set dates for the kickoff meeting, a volunteer opportunity, leadership giving meeting(s), and a campaign celebration.
- ☐ Create a theme with activities and incentives.
- ☐ Personalize pledge cards before employee meetings. Your United Way Account Manager can help.

## ENERGIZE

Build excitement and awareness.

### PROMOTE YOUR CAMPAIGN \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Ask your CEO to send an email of support to all staff.
- ☐ Hang campaign posters around your company.
- ☐ Announce campaign schedule and activities.

### HOST A VOLUNTEER OPPORTUNITY \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Host a volunteer opportunity that engages employees in United Way's work in the community. Can't leave your office? That's okay. Your United Way Account Manager can help you plan a project that fits your company's needs.

## ENGAGE

Show your employees how their support ensures a better future.

### HOST A KICKOFF \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Host a kickoff during a regularly-scheduled staff meeting and announce your goal.
- ☐ Sample agenda:

|                           |                            |        |
|---------------------------|----------------------------|--------|
| Welcome/Endorsement       | CEO or campaign leader     | 2 min. |
| Success Story             | Employee speaker           | 3 min. |
| Campaign overview / Q & A | United Way Account Manager | 4 min. |
| Incentives and activities | Campaign leader            | 2 min. |
| Distribute pledge cards   | Campaign leader            | 2 min. |

## ENCOURAGE GIVING \_\_\_\_/\_\_\_\_/\_\_\_\_

Contributing is a personal matter and should be kept confidential. Pressure to give is unacceptable.

- ☐ Make the ask. The number one reason people say they don't give is that no one asked them.
- ☐ Offer incentives or matches to encourage participation or increased gifts.
- ☐ Promote the ease of giving through payroll deduction.
- ☐ Ask for pledge cards to be returned by a certain date. Send a reminder as the date nears.

## HIGHLIGHT LEADERSHIP GIVING \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Host a special meeting(s) for employees to learn about Leadership Giving.
- ☐ Ask your United Way Account Manager to schedule a volunteer to speak and make the ask.

## SHOW YOUR SUPPORT \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Include the United Way logo on your website and social media presence to let the community know you're committed to giving back.

## STAY CONNECTED

- ☐ Encourage your employees to keep us with us year-round by following us on social media. You can find us on Facebook and Instagram @heartofarunitedway.
- ☐ Tag us when you share photos of your campaign on social media so that we can celebrate with you!

## FOLLOW UP \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Follow up with employees who did not attend the kickoff or return their pledge card.
- ☐ When meeting one-on-one, share why you contribute and how United Way is meeting local needs. Ask the donor if they have any questions. If they have questions you aren't able to answer, ask your United Way Account Manager to help you follow up.

# APPRECIATE

Let them know how much their support means.

## CELEBRATE YOUR SUCCESS \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Hold a celebration event (ice cream social, pizza party, etc.) to announce your results and thank your donors. Every campaign is worth celebrating!
- ☐ Share the success of your campaign on social media. Be sure to include photos and to tag us in your posts.

## SAY THANKS \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Thank your CEO and management for their support of the campaign.
- ☐ Recognize and thank donors and committee members. A note or treat left on their desk is a great way to let them know their support is appreciated.

# FINALIZE

Wrap it up.

## REPORT YOUR RESULTS \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Complete your report envelope. Call your United Way Account Manager to pick it up. Results are due by December 15.

## REFLECT ON YOUR CAMPAIGN \_\_\_\_/\_\_\_\_/\_\_\_\_

- ☐ Jot down a few notes for next year's committee. What worked? What didn't?
- ☐ Document your budget, campaign results, those interested in volunteering and any feedback you received.