

GETTING STARTED

2.4 8 Steps to a Successful Campaign



Define Internal Roles & Responsibilities:

- Recruit a team to help you run your workplace campaign
- Diversity is important – include people from various departments

Our Team:



Nail Down Logistics:

- Determine your timeline (1-2 weeks is a good length for a workplace campaign)

Campaign start date.....

Campaign end date.....



Set a Challenging and Attainable Goal:

- Review past campaign giving history – what areas of giving can be extended or increased? Are there ways to become more engaged?
- Identify growth potential in all types of giving – employee, corporate, special events, leadership, sponsorships and volunteer involvement

Our Campaign Goal/s



Plan Your Employee Campaign Activities

- Hold Rallies or special events
- Incorporate into trainings/meetings (i.e. safety meetings, staff meetings)
- Participate in volunteer projects
- For more resources, visit www.hlunitedway.org

Our rallies and activities will be held on.....



Organize Targeted Group Activities

- Recruit/invite upper management and organization leaders
- Inform attendees about the Lake Superior Leadership Society
- Start or run a retiree campaign

Our leadership giving meeting is.....



Communicate & Publicize the Campaign

- Email and personalized letters
- Posters in lobbies, kitchens/lounges, elevators
- Incentives & prizes: (You can order items from the UW store at www.unitedwaystore.com)
- Presentations: UW campaign staff available to present and share info
- HLUW materials (brochures, posters, campaign video, pledge forms, casual day sticker template and more!)

What methods you will use.....

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Thank Donors & Employees

- Ensures employees have a positive experience & continue to donate
- Thank donors, employees & campaign team at the end of the campaign (prize drawings, luncheons, & personal letters)

How you will thank donors and employees.....

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Employee Campaign Wrap Up

To report campaign results, complete the front of the envelope, seal with pledge forms and payments, & deliver to HLUW or call for pick up.

Remember:

- Record the total number of employees and donors
- Include contact information (phone and email) in case we have questions about the pledge
- Make sure each donor selected a geographic area for their gift
- Ensure designation and/or credit forms are attached to pledge forms, as indicated by donor
- Be sure to calculate the total for all employee and corporate gifts and special events
- Remind donors to keep their copy of the pledge form for tax purposes

Results will be turned in to HLUW by.....