

# Planning Your Campaign

Careful planning leads to successful campaigns. The worksheet/checklist below will help you prepare an effective campaign. Remember, information about United Way of Lapeer County and the services it provides is essential when seeking support from your colleagues. We're confident you'll meet your campaign goals if you follow the suggestions below.

## 1. Get to Know Your United Way

- **Attend** an Coordinator's Idea Exchange
- **Tour** a United Way agency to see first-hand how your donations help people in need
- **Read** the Impact brochure (enclosed) to learn how United Way agencies and partners provide community solutions

## 2. Involve Your CEO

- **Meet** with your CEO to discuss the objectives of the campaign and the employee goal
- **Ask** CEO to allow time for training, group meetings, and agency tours
- **Demonstrate** CEO's support with an endorsement letter
- **Identify** incentives for CEO to approve
- **Ask** CEO to attend committee meetings and/or training, kickoff event, and leadership giving meetings

## 3. Develop a Strong Campaign Team

- **Involve** individuals from as many levels and divisions of your organization as possible, including labor union representatives if applicable
- **Assign** specific tasks to each committee member
- Marketing/Communications
- Kickoff Event
- Incentives
- Leadership Giving
- Group Meetings
- Pledge Cards
- Thank You Event



*Serving as a campaign coordinator opened my eyes to the needs of our community. Before my involvement I did not understand the impact corporate fundraising campaigns play. Now I realize how important it is to give to United Way of Lapeer County.. It feels good to know your money is being spent to help those that need it."*

#### 4. Gather and Evaluate Information

- Evaluate prior year's campaign
- Campaign team training
- Management support
- Campaign team composition
- Labor participation
- Internal communications, events, and incentives
- Review past campaign results to learn:
- Total number of employees
- Total amount pledged
- Average employee gift
- Percent participation
- Total number of contributors at each leadership level

#### 5. Set Campaign Objectives

- Increase average gift from \_\_\_\_\_ to \_\_\_\_\_
- Strategies to increase average gift:
  - Conduct a Leadership Giving program
  - Link incentives to increasing average gift
- Increase participation from \_\_\_\_\_ to \_\_\_\_\_
- Strategies to increase participation:
  - 100% presentation goal
  - Conduct group meetings
  - One-on-one solicitation
  - Link incentives to participation
  - Based on the above, **determine** your campaign goal

This year's campaign goal is \$ \_\_\_\_\_

## 6. Promote the Campaign

- Use your in-house newsletter or other forms of company communications to promote the campaign. Be sure to highlight the campaign team
- **Display** United Way posters and materials throughout the building
- **Use** voice mail, e-mail, and/or other media to educate employees about United Way of Lapeer County and to update employees on the progress of the campaign
- **Plan** activities around campaign theme or
- **Use** the tools, tips and techniques included with this Tool Kit
- **Call** your United Way campaign contact to request promotional materials

## 7. Conduct Leadership Giving Program

- Ask targeted employees to give \$1,000 or more through a model Leadership Giving campaign
- Important elements of a Leadership Giving campaign include
  - Enlist active commitment of CEO
  - Designate a Leadership Giving coordinator
  - Hold special Leadership Giving events (i.e. breakfast, reception, etc.)
- Conduct Leadership Giving group meetings
  - Distribute personalized Leadership Giving packets
  - Make one-on-one solicitations to follow-up on all packets

## 8. Ask for Contributions

The most important step in your campaign is asking your employees to give to United Way. Even though you may have a well-planned campaign with many exciting events, if employees are never asked to give, it will not be successful. Your United Way campaign contact can help you with one of the time-tested methods below.

**Group Presentations** are the best way to increase understanding on the difference a gift to United Way of Lapeer County makes in people's lives and in our community. After bringing employees together in small groups to view the United Way film, receive an informative brochure, and hear an agency speaker they are asked to make a pledge. The format of a group presentation can be tailored to meet your organization's needs. (Sample agenda on page 7.)

- Encourage employees to complete and return their pledge cards at this time
- Offer incentives to those who turn them in at the meeting

## Sample Group Presentation Agenda

Person	Topic	Time
CEO/Senior Executive	Welcome and endorsement	2 minutes
Union Leader (when applicable)	Endorsement	2minutes
UW staff/Loaned Executive	Provide brochure, explain how donations improve lives	5 minutes
Agency speaker or Campaign film	Portrays benefit of services and need for support	6 minutes
Employee Coordinator	Closing remarks	2 minutes
Employee Coordinator	Ask for employee contribution /collect pledge cards/thanks	3 minutes

**Total: 20 minutes**

### Benefits of Group Presentation

- Requires fewer one-to-one presentations and follow-ups
  - Campaign team can present an organized program
  - Employees receive high-quality information on which to base their decision
  - It allows employees to make an individual decision in a pressure-free environment
- Surveys indicate that group presentations encourage employees to give more, and even more importantly, they help contributors to feel good about their gifts and themselves.



*"Group meetings are the cornerstone to any campaign and the key to our success. Group meetings ensure we deliver a personalized pledge card and a consistent message to all of our nearly 500 local employees. At the same time, the group setting is also the ideal environment for employees to hear personal testimonies from peers, United Way staff and/or agency speakers on the value of their contribution to the community."*

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### **One-to-One Presentations**

- Many organizations use one-to-one presentations as a personal approach to each donor
- When requested, United Way of Lapeer County can provide training sessions to educate volunteers about United Way so they can feel comfortable asking co-workers to donate
- One-to-one presentations are useful in conjunction with group meetings to reach all employees
- One-to-one presentations are useful in companies unable to conduct group Presentations

### **One-to-One Presentation Model**

- Share enthusiasm and facts about your United Way
- Answer questions
- Ask for contribution

### **Say Thanks!**

### **9. Report Campaign Progress**

Regular reporting to employees, team members and United Way staff helps keep people involved. Reports should monitor:

- Total number of donors to date
- Total dollars raised to date
- Number of Leadership Givers
- Outstanding pledge cards

### **10. Say Thank You**

Everyone who participates in your campaign should be thanked.

- CEO
- Contributors
- Campaign Team
- Leadership Giving Coordinator
- Thank yourself for making a difference in our community!

