

Review Past Campaign Results:

Here are specific elements your team should consider when determining your goal:

Last year's campaign

- Overall employee giving _____
- Corporate giving _____
- Percent of participation _____
- Leadership giving _____
- Payroll deduction giving _____
- Average gift _____
- Non-givers/ 1st time givers _____
- Fair Share givers _____

Look for trends by analyzing the results from various angles, such as by department, location, or shift. You should also compare management to hourly employees. Use any or all of these metrics to set campaign goals & increase giving during the new campaign.

To analyze giving further, list some of your company's strengths & weaknesses in past campaigns. You may also use the Campaign Analysis Worksheet included in your training materials.

- Strengths _____

- Weaknesses _____

Determine Campaign Needs:

Your team will identify numerous needs once you begin campaign discussion. Keep a note of all needs, especially those that require an ask, purchase, or help from another department. Here are a few reminders:

HR/Payroll-need for payroll information, instructions, or help in personalizing pledge cards

Communications/Marketing-creation of materials such as posters, banners, videos or assistance in organizing fun events

Room/Equipment Reservations-reserve or request the help of others involved in the meeting rooms & equipment you will use for events

Budget-a budget your Department Head or CEO will approve for incentives, special events, & materials

Other Campaign Needs:

Secure Support from Management:

Enlist your CEO's visible and personal support to ensure that your campaign is a success. The support of your CEO and Top Management can lead to more resources, more flexibility in planning and implementing your campaign and recognition for all involved. In addition, support of the organization's leadership sets a positive tone for the campaign and can also set the stage for increased contributions at every level.

With last year's results in hand and a potential goal and timeline in mind, set a meeting with your CEO and ask him/her to:

- Visibly support the campaign and support the campaign team in the necessary time to plan and run a successful campaign
- Make a corporate gift
- Enlist the support of all senior executives and encourage them to visibly support the campaign as well
- Recruit a member of senior management as Leadership Coordinator
- Write a personal letter (UW provides letter samples on the website) to the employees and speak at an employee meeting. Attend group meetings and other campaign activities
- Approve time and resources that will be needed to hold a fun and educational campaign
- Ensure newly hired employees are given the opportunity to contribute when hired-request additional pledge forms from UW staff
- Actively involve retirees in the campaign
- Stay involved in a year-round relationship with United Way and the community

Make adjustments to your plan after meeting with your CEO. Schedule another meeting with your campaign team to finalize the following details:

Campaign Goal: _____

Campaign Timeline:

Smaller companies (less than 100 employees) conduct campaigns in a one-week time period, while larger companies may take up to three weeks to complete their campaign. Think about the atmosphere of your organization to determine what will be most successful in creating your timeline. Be mindful of the timeline for the overall United Way Campaign Calendar.

Here are some other tasks to consider in setting a timeline:

- Campaign team training and meetings
- Themes/Events
- Meeting with and sending endorsement letters from CEO/Labor
- Meeting with your HR and/or payroll team member to confirm procedures
- Ordering Campaign Materials from United Way (brochures, posters, pledge cards, videos, leadership campaign materials)
- Personalize Pledge Cards (if appropriate for your organization)
- Securing Incentives
- Identify employees in your organization who have personal stories they would like to share.
- Display posters and other campaign information throughout organization
- Run your leadership campaign early to set the pace
- General campaign kick-off event
- Employee meetings with scheduled speakers and agency tours
- Send reminders about employee meeting dates and times. Use emails and/or voice mail in addition to posters or announcements.
- Announcements for campaign progress and totals
- Deadline for turning in results internally and to United Way of Northeast Georgia
- Sending or carrying out thank you gestures
- Final campaign celebration -announcement of final campaign results, internal recognition and awards

Other: _____

United Way Campaign Timeline

	<u>Pacesetters</u>	<u>Fall Campaign</u>
<i>Training</i>	June	July & August
<i>Kick off</i>	June	August 22nd
<i>Turn in Results</i>	August 13th	November 16th
<i>Final Report/Victory</i>	August 16th	January, 2008