

# 8 Steps to Success

We invite you to incorporate as many of these best practices as possible in your workplace campaign. Follow the “8 Steps” and you have a greater chance of achieving your campaign goals.

1. CEO Support and Involvement
  - Pledge a company gift (if applicable).
  - Commit to holding employee meetings.
  - Make a personal contribution.
  - Visibly and actively support the campaign.
2. Recruit a capable, committed campaign team
  - Include one person from each department on your committee. Involve labor representatives, if applicable.
  - Participate in United Way Employee Campaign Coordinator training sessions.
3. Set an Aggressive Campaign Goal/Track Results
  - Analyze past performance.
  - Set an ambitious goal that stretches your team. Goals can include total dollars raised, percent participation and/or Leadership goals.
  - Advertise goal.
  - Track and report progress regularly.
4. Work with United Way to Develop a Campaign Plan
  - Meet with your United Way representative to help you plan.
  - Use United Way campaign tools and materials posted on our website.
  - Secure raffle items or incentives for the campaign.
  - Plan special events to create enthusiasm and raise funds.
5. Conduct a Leadership Giving program (Gifts of \$500 or More)
  - Conduct a Leadership Giving breakfast or meeting.
  - Set specific Leadership Giving goals.
  - Ask senior management to be Leadership Givers.
  - Discuss Leadership Giving at all employee meetings.
  - Provide special recognition for Leadership Giving.
6. Hold Meetings for All Employees
  - Schedule 20 to 30-minute meetings to reach all employees.
  - Provide food, door prizes, and incentives for giving.
  - Include the United Way campaign video or a speaker from a United Way partner provider.
  - Ask a co-worker to share a personal story about their experience with United Way.
  - Educate everyone about the positive changes their gift makes in the community.
  - Follow up with all employees.
7. Promote, inform and have fun!
  - Build United Way awareness.
  - Ask everyone to give.
  - Have fun!
8. Thank, Recognize and Report
  - Post internal thank you messages: signs, articles, and banners.
  - Publish an internal roster of Leadership Givers and Loyal Contributors.
  - Report results to United Way and employees.
  - Conduct campaign debrief with United Way and your Loaned Employee.

## Keep in mind...

- 90 percent of your time is spent planning and organizing your campaign and only 10 percent is spent running it.
- Try to include the informal leaders of your company. These people already have the respect and trust of their co-workers and will be influential when it counts.
- Have a year-round campaign! Hold special events several times a year rather than several during one week. It's easier to ask people to contribute small amounts over the course of a year. Check out our special event guide for ideas.
- Keep a notebook or file of your plans for next year. You or your successor will be glad you did!

Remember, when people are asked why they did not give, the response heard most often is...  
“I was never asked!”



United Way of  
Northwest Michigan

[www.unitedwaynwmi.org](http://www.unitedwaynwmi.org)