

CAMPAIGN TIPS

10 BEST PRACTICES FOR A SUCCESSFUL CAMPAIGN

1. Build a team and secure CEO/management support.
2. Determine your timeline and start planning at least 2-4 weeks before your kick-off. (*If able due to COVID-19)
3. Set your goal.
4. Plan your campaign activities.
5. Incorporate volunteering into your campaign.
6. Promote your campaign to employees (and retirees).
7. Start your campaign with a fun, inclusive kick-off.
8. Organize special events and use incentives.
9. Recognize leadership donors, first time donors, etc.
10. THANK employees and celebrate success!

UNITED WAY CAN HELP WITH...

- Running reports
- Sending thank you notes, videos, marketing collateral, etc.
- Speaking at meetings and special events
- Participating in campaign team meetings
- Identifying opportunities for volunteering
- End of campaign analysis and debrief

UnitedWayofWilson.org



QUICK START GUIDE

CAMPAIGN COORDINATOR (CC)



United Way of Wilson County is leading a movement to END local poverty.



THE ROLE OF A CC

1. **PLAN** Assemble a team & plan the campaign
2. **INSPIRE** Share United Way's story and impact
3. **ENGAGE** Volunteer & learn
4. **ASK** Ask co-workers to invest
5. **THANK** Say thank you & celebrate success

As a CC, you are helping local children, families, and adults find pathways out of poverty.

GET THE ANSWERS YOU NEED

- What is United Way?
- Why give?
- Why is United Way focused on poverty?
- What can \$2 do?
- How does United Way make funding decisions?

Find answers and more at UnitedWayofWilson.org

YOUR UNITED WAY TOOLKIT

- Speaker Request
- Volunteer Resources
- Marketing Materials
- Impact Statistics & Stories
- Special Event/Incentive Ideas
- Pledge Form online or in person
- Videos (Agency Tours & Campaign Video)

Find these and more at UnitedWayofWilson.org

CAMPAIGN PLANNING WORKSHEET

What are your campaign goals?

Total campaign \$: _____
of new donors: _____
% participation rate: _____
OTHER: _____

What are your campaign dates?

Start: _____
End: _____

Who do you want on your campaign team?

-
-

Who in executive management will you recruit to help?

-
-

What campaign events/volunteer activities will you plan?

-
-

CAMPAIGN WRAP UP

- Collect pledge forms, cash, and checks
- Report results to employees & prepare envelope for UW
- Update United Way on the # of employees at your company
- Call United Way to pick up envelope or drop off at UW
- Evaluate your campaign and start planning for the future