



United Way of Greater Cleveland

Steps to a Successful United Way Campaign

1 Recruit a Winning Campaign Committee

Don't try to do everything yourself. Get together a team including people from all areas of your organization, from front line workers to management.

Employee Campaign Manager (ECM)

Philanthropist Society Coordinator (donors of \$10,000+)

Humanitarian Society Coordinator (donors of \$1,000 to \$9,999)

GeneratioNEXT Coordinator (donors in their 20s and 30s)

Next Year's Employee Campaign Manager (ECM)

Representative from Management

Representative from Human Resources

Representative from Accounting

Representative from Marketing/Communications

Your UW Staff or Loaned Executive

2 Confirm CEO Support

Ask your CEO to:

- Help determine campaign goals and objectives
- Write a letter encouraging employees to join him/her in contributing
- Support recruitment of campaign committee members
- Conduct a meeting of senior management to promote participation in the Philanthropist Society
- Attend employee meetings to make a personal statement of support
- Appoint a Humanitarian Society Coordinator
- Provide recognition to Campaign Committee members and write a thank you letter to all employees who participated in the campaign
- Determine the amount of your corporate contribution

3 Review Past Performance and Calculate Goal

Amount raised last year: _____

Number of employees: _____

Number of donors: _____

Percent of participation: _____

Average employee gift: _____

Number of Humanitarian Society members: _____

Percent of campaign raised by HS members: _____

Did the campaign have visible management support?

Was the CEO involved?

Which special events worked best?

Why did some not work as well?

In what areas could your campaign improve?

Identify any company changes since last year (new hires, reorganization, layoffs, etc.) Consider the effect of any changes in developing goals for this year's campaign.

Last year's dollar total plus a 10 percent increase in contributions = \$ _____

Set target for increasing number of donors to _____

Set target for increasing average gift to \$ _____

New average gift \$ _____ x number of donors _____ = \$ _____

Overall goal for 2011: \$ _____

4 Establish a Campaign Timetable

- Notify Campaign Committee members and your CEO of dates for the United Way Kickoff, Days of Caring, fundraising events and closing event
- Establish dates for the Humanitarian Society Campaign
- Establish employee campaign group meeting date(s). Plan a short, intensive campaign no more than five-10 days for companies with 100 or less employees
- Schedule speakers from agencies for employee meetings using United Way's Speakers Bureau (your United Way staff person will coordinate this for you)
- Set the campaign end date and schedule a time to turn in your final report to United Way

5 Take Tours, Use an Agency Speaker

A great way to get employees interested in the United Way campaign is to invite an agency speaker to your kickoff event. Our Speakers Bureau includes employees, volunteers and clients from United Way partner agencies. Each one of them has witnessed or experienced the impact United Way's funded programs have on our community.

Agency tours also are available and allow your employees to tour United Way-funded programs to see firsthand how their money makes an impact in our community.

Setting up a tour or speaker is easy. Just let your United Way staff member or Loaned Executive know the date you need and our Speakers Bureau staff will confirm all arrangements with you.

6 Publicize the Campaign

- Through e-mails
- In employee publications
- On your intranet
- In special displays around the workplace
- Use United Way posters and materials
- Show the campaign video
- Consider using incentives to encourage giving
- Encourage employees to visit the United Way of Greater Cleveland website at unitedwaycleveland.org

7 Conduct Employee Campaign

- One to two weeks prior to date of employee campaign, send the CEO letter (visit unitedwaycleveland.org/ecmtools for sample letters)
- Secure incentives from local restaurants, theaters, etc.
- Personalize pledge forms
- Schedule and conduct a kickoff meeting with all employees. If your organization has multiple shifts, have a kickoff meeting for each shift.
- Encourage donors to give to Community-Wide Needs, United Way's general fund
- Show the campaign video
- Distribute pledge forms at the meeting (if your organization uses United eWay, explain the process at the meeting)
- Use guest speakers (LEs, agency representatives, employees who have used a United Way program, etc.)
- Throughout the campaign, report progress on your intranet, via e-mail and goal posters
- Conduct follow-up solicitation. Make sure every employee has been asked to contribute. The number one reason people say they don't give is because they weren't asked.

Materials to Get from United Way

- Report envelopes
- Employee pledge forms
- United Way agency guide
- Campaign video/DVD
- Posters
- Thank you certificates

8 Conduct a Humanitarian Society Campaign

(donors of \$1,000-\$9,999)

- Develop a list of prospects that you feel have the capacity to give \$1,000 or more
- Consider holding a meeting at a partner agency so this group can see firsthand how United Way dollars are at work in Greater Cleveland
- Schedule an agency speaker for the Humanitarian Society Campaign
- Send an invitation from your CEO one to two weeks in advance to current members and prospects
- Develop a plan for one-on-one follow-up with both those who attended meeting and those who did not
- Thank and recognize all Humanitarian Society donors

Materials to Get from United Way

- Personalized Humanitarian Society pledge forms and letters for all current donors, retirees and prospects, as well as brochures and other materials

9 Report Results to United Way

- Submit your final report and donor list to United Way within one week of the close of your campaign using the supplied Campaign Report Envelope
- Carefully complete the information on the front of the envelope (visit unitedwaycleveland.org/ecmtools for detailed instructions)
- Put all cash, checks, credit card, special events money and payroll deduction pledge forms in the Campaign Report Envelope
- Return the Campaign Report Envelope to your United Way staff person or Loaned Executive
- Partial reports are encouraged throughout the campaign
- Pacesetter results are due Friday, Oct. 7

For help with reporting, contact United Way's pledge processing department at (216) 436-2145.

10 Wrap Up and Say Thanks

- Report final results and thank employees through department meetings, company intranet or e-mail messages
- Distribute CEO thank you letter to all employees
- Recognize donors with a thank you certificate (available through United Way)
- Hold a celebration event. You can't say thank you too often!
- Recognize and thank your Campaign Committee
- Evaluate your campaign results and prepare recommendations for next year's Employee Campaign Manager
- Complete our ECM Survey and let us know what we can do to improve the experience for next year's ECM (unitedwaycleveland.org/ecmtools)