

10 Steps to Planning a Successful Campaign

Careful planning leads to successful campaigns. These steps will help you prepare an effective campaign. We're confident you'll meet your campaign goals if you follow the suggestions below.

1 - Get to Know Cedar Valley United Way

- Attend our Rally For The Valley campaign kickoff event in August
- Explore the Cedar Valley United Way website at www.cedarvalleyunitedway.org
- Familiarize yourself with the CVUW mission, initiatives, and partner agencies and programs
- Get to know our partner agencies by contacting them and taking a tour, and /or volunteer for Day of Caring to see first-hand how your donations help people in need

2 - Start at the top – Involve your CEO

- Meet with your CEO to discuss the objectives of the campaign and the employee goal
- Ask your CEO to allow you time for training, UW representative presentations to your coworkers, and to recommend a Leadership Giving Chair
- Ask your CEO to speak about his/her support at a meeting with top managers and employees, and to communicate that support to employees through a letter or email
- Identify incentives and a budget for incentives and prizes for your CEO to approve

3 - Develop a Strong Campaign Team

- Involve individuals from as many levels and divisions of your organization as possible
- Assign specific tasks to each committee member such as Marketing/Communications, Kickoff Event, Incentives, Leadership Giving, Group Meetings/Presentations, Pledge Forms, and Thank You Event
- Hold a training session for your team conducted by your United Way staff or Loaned Executive

4 - Gather and Evaluate Information

- Evaluate prior year's campaign to learn: management support, campaign team composition, internal communications, events, and incentives
- Review Past campaign results to learn: total number of employees, total amount pledged, average employee gift, percent of participation, total number of Leadership Givers

5 - Set Campaign Objectives

- Increase average gift from ____ to ____
 - Strategies to increase average gift: introduce Leadership Giving, link incentives to increasing average gift
- Increase participation from ____ to ____
 - Strategies to increase participation: 100% presentation attendance goal, conduct group meetings, one-on-one solicitation, link incentives to participation
- Based on the above, determine your Campaign Goal

6 - Promote the Campaign

- Use your in-house newsletter or other forms of company communications to promote the campaign and be sure to highlight the campaign team members so those with questions know who they can approach
- Display United Way posters and materials throughout the building
- Hold special events and contests
- Educate employees about CVUW and update them on the progress of the campaign
- Link your intranet and company website to www.cedarvalleyunitedway.org
- Use the tools, tips and techniques provided and request promotional materials from CVUW
- Wear your LIVE UNITED T-shirt!

7 - Conduct a Leadership Giving Program

- Ask selected employees to give \$1,000 or more (\$500 or more for those under the age of 40) through a Leadership Giving campaign
- Important elements of a Leadership Giving campaign include: active support and commitment of CEO, designated Leadership Giving Chair, Leadership Giving group meetings, follow-up after Leadership Giving group meetings, special Leadership Giving events (i.e. breakfast, reception, etc.)