

# 7 Steps to Success

## 1. INVOLVE YOUR CEO

Ask your CEO to:

- Approve a campaign committee
- Endorse a campaign letter to all employees
- Participate in employee campaign meetings

## 2. FORM A CAMPAIGN COMMITTEE

- Recruit from all areas of your organization
- Include people with United Way experience, if possible

## 3. DEVELOP A PLAN

- Develop a timeline and remember to keep it short and sweet. We recommend one week for solicitation and one week for follow-up
- Set a goal and plan your publicity
- Contact Joe Pettyjohn (josephp@uwberks.org) at United Way to have your pledge forms personalized. Please allow two weeks for printing and delivery

## 4. HOLD EMPLOYEE MEETINGS

- Use United Way resources (see page 14-15 for details)
- Develop an agenda, determine logistics and invite your trained Loaned Campaign Specialist (LCS) to speak
- Keep your meeting time to 30 minutes max

## 5. FOLLOW UP

- Ask every employee to return the pledge card whether they give or not
- Have committee members follow up with those who attended meetings but did not return a pledge card
- Designate a committee member to solicit anyone who did not attend a meeting

## 6. REPORT YOUR RESULTS

- Communicate campaign results to your entire organization as soon as they are available
- Summarize employee giving using the appropriate envelopes (yellow for all pledge forms below the Leadership Giving level, blue for all Leadership Giving (\$1,000 and above) pledge forms. See page 16 for instructions or ask your LCS for assistance

## 7. SAY "THANK YOU"

- Hold a special employee meeting to announce and celebrate your results, ask the CEO to send a letter to all givers, and blanket the bulletin boards, lunchroom, and employee communications with messages of appreciation
- Thank your committee members with a special meeting, individual thank you notes, or a special note from the CEO

## Sample Agenda

- Welcome/Introduction** - Company Coordinator (2min.)
- Endorsement** - CEO (2min.)
- Labor Endorsement (if applicable)** - Union President (2min.)
- Campaign Speaker** - LCS/Reverse Tour (9 min.)
- Campaign Video** (8 min. or less)
- Pledge Form Explanation and Incentives** - LCS (5 min.)
- Thank you** - Company Coordinator (2 min.)