

United Way of North Idaho

8 STEPS TO A SUCCESSFUL WORKPLACE CAMPAIGN

Follow the “8 Steps” and you have a greater chance of achieving your campaign goals. CEO support and employee meetings, steps 1 and 6, are a priority. The graphs show how each step contributes to your success.



1. CEO Support and Involvement

- Pledge a company gift
- Commit to holding employee meeting(s)
- Conduct an executive briefing
- Visibly and actively support the campaign
- Pledge a personal Leadership gift

2. Recruit a Capable, Committed Employee Campaign Manager and Committee

- Include one person from each department on your committee. Involve Leadership Givers and Labor representatives, if applicable.
- Send the Employee Campaign Coordinator and committee to a United Way training session



3. Set an Aggressive Campaign Goal/ Track Results

- Analyze past performance (if applicable)
- Set an ambitious goal that stretches your team. Goals can include total dollars raised, percent participation and/or Leadership Giving goals.
- Advertise goal internally
- Track and report progress



Campaign Goal Setting Worksheet:

A workplace goal provides an incentive to give and measure success. Every year, each campaign company should strive to improve their campaign. To that end, set a workplace goal to encourage increases in giving and/or participation.

Calculate your company's total giving potential by using one of the following formulas:

\$ _____ (total payroll) x 0.01 = _____ (giving potential)

\$ _____ (average annual wage) x 0.01 x _____ (number of employees) = _____ (giving potential)

Then, evaluate your potential to recent years giving and set goals:

_____ (# donors last year) / _____ (# employees) = _____ % of participation. Goal: _____ %

\$ _____ (last year's campaign) / \$ _____ (your giving potential) = _____ %.
Goal: _____ %

4. Work with us to Develop a Campaign Plan

- Meet with United Way to plan an “8 Steps” campaign
- Use United Way campaign materials
- Secure resources for the campaign
- Plan fun! How does your company LIVE UNITED?



5. Conduct a Leadership Giving Program

- Conduct a Leadership Giving meeting
- Set specific Leadership Giving goals
- Hold special meetings to ask for leadership gifts
- Ask senior management to be Leadership Givers
- Discuss Leadership Giving at all employee meetings
- Provide special recognition for Leadership Givers

6. Hold Meetings for All Employees

- Schedule 30-minute meetings to reach all workers
- Invite a United Way representative
- Personalize pledge forms
- Ask all employees to return pledge forms, regardless of whether they donated
- Follow up with all employees
- Discuss Leadership Giving



7. Promote, Inform and Have Fun!

- Build United Way awareness
- Publicize campaign events
- Promote LIVE UNITED, giving, advocating and volunteering
- Participate in Day of Caring
- Ask employees to share personal experiences
- Have fun!

8. Thank, Recognize and Report

- Have your CEO thank all donors including Leadership Givers
- Report results to United Way and employees
- Post internal thank-you messages: signs, articles, and banners
- Conduct campaign debrief with United Way and campaign committee
- Attend United Way Awards Luncheon



8 Steps Not Used vs Used

Comparative data on employee per capita results from the top 150 United Way Campaigns. Ensuring CEO involvement (1) and holding employee meetings (6) are essential to the success of the other 6 steps.

Per Capita Results