



## How To Conduct the WORKPLACE CAMPAIGN

**Company Support** – Support from the CEO or top management is crucial to the success of your company’s United Way campaign. Arrange a meeting with management to discuss important details, budget and the payroll deduction program.

**Recruit a Campaign Committee** – Using a committee is a must as part of a successful United Way campaign. Recruit a committee to help you plan and organize the campaign. Try to include members from all levels of the company. Committee size may vary depending on the size of the company.

**Educate Employees about United Way** – Many employees are unaware as to the work United Way does in their community. You will work closely with a company campaign coordinator to educate their coworkers through the use of videos, marketing materials, presentations and continued year-round communications with upcoming events and important messages to share with employees about United Way regularly.

- Employees will experience a greater sense of community awareness and will have the opportunity to become familiar with our focus areas of education, income and health related programs and services available to everyone in Ventura County in case of need.
- **Return on Investment**  
Supporting United Way of Ventura County ensures that the company’s charitable giving will yield the most possible impact in their community.
- United Way is committed to keeping costs low, with much of the work being done by volunteers. Overhead costs are kept low, allowing us to ensure that nearly all contributions go to help those in need.
- **Make the Ask** – The number one reason that people do not give to United Way is because they felt that they were not asked to give. Make sure every employee is given a pledge form or an electronic pledge form, and use personal speeches or a format, written letter to make certain that everyone feels that they were asked to provide a gift.



**Determine How to Educate and Ask** – It is important that the campaign committee be well-informed about the message you want them to convey. They should be knowledgeable about everything from campaign goals to available United Way literature and support materials.

Here are some suggestions to make group meetings run smoothly:

- Use a campaign committee to organize meetings
- Show United Way video
- Publicize meetings well in advance
- Distribute pledge forms (if applicable) at the meeting
- Have Food!
- Have a campaign committee member follow up with those who did not attend the meeting
- Provide an incentive for those attending
- Communicate a clear timeline for completing the asks and follow up
- Have fun!

**Review Your Company's Past Performance** – One of the keys to planning a successful United Way campaign is to evaluate past campaigns. Former Employee Campaign Managers in the workplace are a great source for such information. Set up a meeting with your former United Way ECM to answer the following questions.

Was the total employee contributions during the last campaign?

Was there a major special event?

How many employees contributed?

How was the campaign publicized?

What was the average employee gift?

What were the best parts of last year's campaign?

What is the current total number of employees?

Was the CEO or top management involved in the campaign?



How were your employees thanked?

**Set Goal** – Your Goal should be a joint decision between the campaign team and the CEO/Upper management. Devise a plan: **What if....everyone at the company increased an extra \$1. more each month? The amount given by existing contributors increases by\_\_?, etc.**

**Publicize Your Campaign** – Start building excitement about your campaign. Let everyone know you are all working toward a common goal with creating messaging and signage. Example: Use a theme, Display Thermometers, messages about the campaign through email.

**Conduct the Campaign** – Preparation is key to conducting a successful campaign. All rallies should have a specific agenda. **2 minutes -Welcome everyone, 3 minutes ECM thanks employees for attending, introduces campaign committee, 3 minutes Campaign Division Director, presentation and who benefits, 4 minutes Video, Summarize the importance in supporting United Way and say thank you and draw for prizes (Optional)**

**Follow Up** – Collect all pledge cards. Thank everyone who attends the meeting. Answer any questions.

**Report Results** – Once the campaign has been completed and when campaign results are provided either through the company or a selected Vendor (explained below,) you are responsible in processing the campaign results with an Employee Summary Report. Process any pledge cards (if applicable). Process any cash & Checks, Credit cards. Company Payroll will process any Payroll Deductions.