BEST PRACTICES

**1. CONFIRM LEADERSHIP SUPPORT**

* Confirm your leaders support and ask them how they want to be involved and talk about goals.
* Inquire about a corporate gift.
* Secure a budget; ensure time is allocated for campaign-related activities.

**2. SELECT A STRONG CAMPAIGN TEAM**

* Recruit co-workers to serve on your team; seek representation from all departments and levels.
* Allow team to set goals for their departments and assist in deciding how best to engage peers.
* Involve overlooked groups: ask a retiree or past leadership giver to serve on the team.
* Consider sustainable practices like 2-year rotations, mentoring processes, volunteer activities, and agency visits.

**3. PLAN AND PREPARE**

* Provide UW with company information: address, # of employees, leadership name(s), phone, company email.
* Set realistic campaign goals and establish a timeline that suits your work flow.
* Connect goals with impact; visit uwce.org/campaignhq for success stories and impact data.
* Meet with UW representative to plan campaign, identify growth areas, and set dates.

**4. PROMOTE LEADERSHIP GIVING**

* Plan a leadership program.
* Connect with company leadership to recruit a respected senior staff to make individual leadership asks Beacon, Young Leaders, Alexis de Tocqueville.
* Identify prospective leadership donors by targeting:
  + Employees who gave at leadership levels last year.
  + Donors of $500 or more, or those whose annual salary is $60,000 or more.
* Always remember, YOU aren't asking, the community is.

**5. CONDUCT AN EDUCATIONAL CAMPAIGN - EVEN VIRTUALLY**

* Kick-off with strength. Schedule a meeting where your UW representative can share the UW story, distribute brochures and pledge forms, and answer any questions.
* As a bonus, any staff who participates in a UW presentation will be eligible for our prize drawing.
* Meeting should take place when most employees can attend.
* Coordinate a stand-alone group meeting or add UW to the agenda for a regular team meeting.

**6. MOTIVATE TO BUILD MOMENTUM**

* Make giving manageable. Asking someone to give $2 per week sounds easier than $100 per year. Encourage payroll deduction.
* Promote Caring Club®. Donors who give $3.50 per week are eligible for discounts at a variety of local businesses (details at uwce.org/caringclub).
* Try something different:
  + Host a special event.
  + Generate enthusiasm and camaraderie.
  + Create a challenge or consider participation awards like casual day, raffle, time-off.
  + Invite healthy competition among departments to see who raises the most money, has the highest participation rate, or recruits the most volunteers.

**7. WRAP-UP AND REPORT RESULTS**

* Collect pledge forms and complete the Campaign Report Envelope.
* Schedule a wrap-up meeting with your UW representative; turn in the report envelope with pledge forms and any cash donations.
* Share learnings and opportunities for improvement with UW staff.

**8. SAY THANK YOU**

* Send a letter or email from you and/or your leadership announcing the campaign results and saying thank you (sample wording attached).
* Thank everyone for their contributions of time, voice, and money. Remember, just listening to the message can create advocates.
* Celebrate with the whole group and recognize special efforts; consider simple ways to say “thanks” by honoring incentives or hosting an event.

**9. CONNECT YEAR-ROUND**

* Establish a new hires program for new employees to support United Way.
* Encourage co-workers to subscribe to UWCE’s monthly e-newsletter or add a United Way spotlight to your newsletters and staff meetings.
* Visit uwce.org and find success stories and videos to share; follow UWCE on social media.
* Organize company-wide volunteer opportunities through United Way Volunteers at uwce.org/uwvolunteer.
* Be a champion for our community throughout the year when you give, advocate, and volunteer.

**Sample Meeting Format – 20 minutes total**

**Topic** **Presenter** **Time**

Welcome Champion 1 minute

Distribute brochures and pledge forms

How United Way Helps the Community UW Representative 5 minutes

United Way Success Story / Video 3-4 minutes

Assistance with pledge forms, prize drawing UW Representative 3 minutes

Leadership Endorsements Leadership 3 minutes

Questions, thank you, wrap up UW + Champion 4 minutes