

# → 5 Steps to Running a Successful Campaign



## STEP 1 Connect with Us

We want to better understand your goals and how you would like to approach your campaign. We also want to tell you more about our strategy for building stronger, more equitable communities!

- Attend the Pacesetter Kick-Off to learn more about the campaign
- Check out our website for additional campaign resources
- Call the United Way to visit about campaign strategies and schedule a presentation



## STEP 2 Make a Plan

The keys to campaign success are preparation and teamwork. Having the right group of campaign volunteers will increase the success of your campaign and make your role much easier.

- Set fundraising and participation goals, objectives and a timeline. Identify and recruit your team!
- Configure an online giving platform for a more streamlined donor experience. Lots of options for pledge forms to meet needs of your employees.
- Learn about various strategies to make your campaign fun and engaging. Call us—we have many options for in-person, virtual, or hybrid activities!



## STEP 3 Inspire Co-Workers

Tell people how their dollars are making a difference. Share stories about our neighbors who are struggling to make ends meet or those who have been impacted by racial inequities.

- Promote a culture of giving back. A successful campaign requires frequent communications and reminders.
- Engage co-workers in the campaign through virtual engagement and volunteerism. Don't talk *at* them; get them talking with each other, learning, and sharing. Check out [Go2Volunteer.org](http://Go2Volunteer.org) for opportunities to volunteer!
- Share your own personal story about why you support United Way. Invite the United Way and a partner agency to present at your meeting.



## STEP 4 Make the Ask

The number one reason people don't give is that they were never asked.

- Kick off your campaign with a fun event featuring an energetic and inspiring ask to give! We can help you do that virtually or in person.
- Create fun activities to drum up support and provide incentives for your colleagues to participate, such as earning an extra vacation day if you give in the first 24 hours, purchasing raffle tickets to win a free lunch delivery, or a subscription to Spotify. Get competitive while giving back!
- Have your company CEO write a letter or make a speech. CEO commitment and leadership help drive participation.
- Let's talk format. If peer-to-peer, in-person asks aren't an option, let us walk you through email/virtual best practices.



## STEP 5 Convey Gratitude

Let us help you thank your donors. Remember, we can't thank them if we don't know them! Sharing data is encouraged!

- Review campaign results with your United Way team.
- Share the impact! Publicize the campaign results in your company newsletter, intranet, social media channels, or a message from the CEO.
- Send individualized thank-you notes to each donor. Don't forget to say "Thank You!"

### CONNECT WITH US!

### Campaign Resources

Email a United Way Representative → [karly@heartlandunitedway.org](mailto:karly@heartlandunitedway.org)  
Campaign Toolkit (Print and Digital) → [heartlandunitedway.org](http://heartlandunitedway.org)

Engagement and Volunteer Opportunities → [Go2Volunteer.org](http://Go2Volunteer.org)

Social Media → [@HEARTLANDUNITEDWAY](https://www.facebook.com/HEARTLANDUNITEDWAY)     