

# 10 STEPS TO A SUCCESSFUL UNITED WAY CAMPAIGN

# 1

## START AT THE TOP

Get your CEO involved in campaign planning and discuss budgets and potential corporate support.



# 2

## SET GOALS

Evaluate your past campaigns, determine where you want to grow this year and set your goals.

*Pro tip: Your United Way rep can help with this!*



# 3

## PLAN AHEAD

Set your timeline and budget early to make it easier to identify campaign activities and delegate tasks to a committee. (see #4)



# 4

## GET HELP

Recruit a committee to help plan events, coordinate emails, hand out materials and think of new fundraising ideas.



# 5

## GET THE WORD OUT

- Order campaign materials like posters, brochures and more at [unitedwayroclx.org/campaignresources](http://unitedwayroclx.org/campaignresources)
- Share how, where and when to pledge and incentivize giving
- Plan emails from your CEO and co-workers who want to share why they donate
- Make sure everyone knows their gift can have double the impact with this year's challenge grants



# 10

## HAVE FUN!

Get your face messy during the pie eating contest and show off your bowling skills during your United Way bowling tournament.

Make sure you (and your co-workers) have fun during the campaign!



# 9

## THANK & REPORT

Thank your committee, CEO, leadership team and donors for their support and let them know how much you went over your goal (or how close you came!).



# 8

## ASK

Include leadership, new hires, staff and retirees by providing them with a pledge form or a link to pledge online. Worried about asking co-workers to give? Don't forget . . . you're not asking for you—you're asking for thousands of local people in need.



# 7

## LEADERSHIP GIVING

Recognize your leadership donors with a special kickoff or reception and encourage your leadership-level staff to pledge early to show their support and set an example.

*Pro tip: Successful campaigns have high involvement from the CEO and leadership team.*



## CAMPAIGN TIME!

# 6

- Hold a kickoff meeting (party time!)
- Distribute materials and show the campaign video
- Create opportunities to learn more about United Way's Community Impact Fund



**United Way of Greater Rochester and the Finger Lakes**  
Serving Genesee, Livingston, Monroe, Ontario, Wayne, and Wyoming Counties