

8 STEPS TO SUCCESS

United Way has a road map to campaign success. Follow the “8 Steps” and you have a greater chance of achieving your campaign goals. CEO support and employee meetings, steps 1 and 6, matter the most. The graph on the following page shows how each step contributes to your success.

1. CEO Support and Involvement

- Pledge a company gift (if applicable)
- Commit to holding employee meetings
- Conduct an executive briefing
- Visibly and actively support the campaign
- Pledge a personal Pillars gift of \$1,000

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

- Include one person from each department on your committee. Involve Labor representatives and Loyal Contributors if applicable.
- Send the Employee Campaign Manager and committee to a United Way training session

3. Set an Aggressive Campaign Goal/Track Results

- Analyze past performance
- Set an ambitious goal that stretches your team. Goals can include total dollars raised, percent participation and/or Pillars goals.
- Advertise goal
- Track and report progress

4. Work with United Way to Develop a Campaign Plan

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

5. Conduct a LIVE UNITED Leaders Program

- Conduct a Pillars meeting
- Set specific Pillars goals
- Hold special meetings to ask for leadership gifts
- Ask senior management to be Pillars

- Discuss Pillars and leadership giving at all employee meetings
- Provide special recognition for Pillars

6. Hold Meetings for All Employees

- Schedule 30-minute meetings to reach all workers
- Include the interactive presentation or custom video from a United Way representative
- Personalize pledge forms with employee names
- Ask all employees to return pledge forms, regardless of whether they donated
- Follow up with all employees
- Discuss Pillars

7. Promote, Inform and Have Fun!

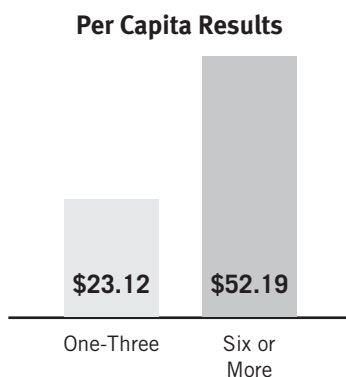
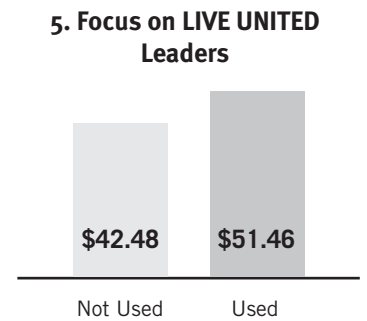
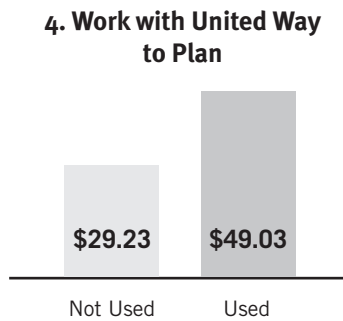
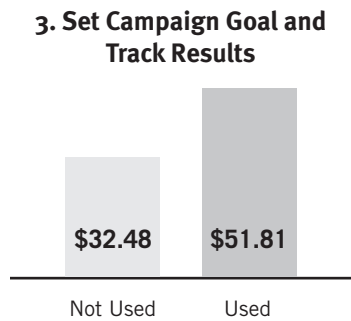
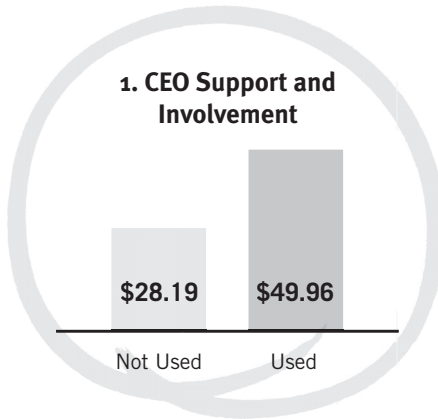
- Build United Way awareness
- Publicize campaign events
- Promote LIVE UNITED, giving, advocating and volunteering
- Attend the Campaign Kickoff event Sept. 5, 2012
- Participate in the year-round on-demand Everyday of Caring
- Ask employees to share personal experiences
- Have fun!

8. Thank, Recognize and Report

- Have your CEO thank all donors including Loyal Contributors and Pillars
- 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

What difference will it make to your campaign results if you use the 8 Steps to Success?

Comparative data on employee per capita results from the top United Way campaigns in Central Washington:
8 Steps Not Used. vs. Used



Two steps, CEO involvement (1) and employee meetings (6), make the greatest difference.