

## “GOLD STANDARDS” FOR CAMPAIGN SUCCESS

Follow these five evidence-based best practices to increase the success of your campaign and the impact delivered to our community:

- 1 PRESENTATIONS**  
A United Way representative or agency speaker shares impact stories and helpful info about community resources with employees
- 2 INCENTIVES**  
Even simple campaign perks can add interest and help motivate employee engagement
- 3 EVENTS**  
Special events help create enthusiasm and excitement for the campaign
- 4 VOLUNTEER ENGAGEMENT**  
Through volunteer events and opportunities, employees are able to invest in their community in a hands-on and meaningful way
- 5 CORPORATE MATCHING**  
The company can show their dedication and encourage employee giving by matching a percentage or dollar amount of their employees’ donations

Contact your Relationship Manager today to discuss these five evidence-based best practices and increase the success of your campaign! See our online Campaign Toolkit at [www.OttawaUnitedWay.org](http://www.OttawaUnitedWay.org) for incentive and event ideas!

## REACH FOR THE STARS! GOALS AND CAMPAIGN AWARDS

Use this list of campaign awards and eligibility criteria to guide your path to success:

### Community Builder Award

- An increase in employee giving from previous year
- At least \$175.00 average employee gift
- 50% + participation by employees in campaign
- Employee volunteer involvement
- 3+ employees give at LLC level (\$500 or more)

### Gold Award

- Meets 4 of 5 Community Builder Award criteria

### Silver Award

- Meets 3 of 5 Community Builder Award criteria

### Out-of-the-Box Award

- Awarded to one corporate partner
- Creative theme
- Original activities

### Joe Martella Above and Beyond Award

- Awarded to one Employee Campaign Coordinator
- ECC goes “above and beyond” to add excitement to the campaign, help others realize the importance of United Way, and encourages volunteering

Refer to the ECC Handbook for more information and FAQs.

**Access the ECC Handbook and all other campaign resources online at [www.OttawaUnitedWay.org](http://www.OttawaUnitedWay.org).**



## KEY CAMPAIGN DATES

Training: \_\_\_\_\_

Planning Meeting with RM: \_\_\_\_\_

Kick-Off: \_\_\_\_\_

Wrap-up Meeting with RM: \_\_\_\_\_

Name and Contact info for assigned RM: \_\_\_\_\_

Campaign Goal(s) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## 8 WEEKS BEFORE KICKOFF

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Attend a United Way ECC training.**  
Whether this is your first campaign or you're a seasoned ECC, our trainings are fun, informative, keep you up to date on the latest changes, and give you the opportunity to learn and share with your peers.
- Meet with your United Way Relationship Manager (RM).**  
Use their guidance and expertise to build a successful campaign plan.

### **Together, you can:**

- Review past performance.
- Develop campaign goals.
- Identify opportunities and challenges.
- Explore upcoming campaign themes and materials.
- Draft strategies to meet these goals and improve on last year's results.
- Determine campaign start and end dates.

*The most effective campaigns are best kept to about 2 weeks. Starting and ending a campaign with a clear kickoff and wrap up are important factors when creating your timeframe.*

**Start:** \_\_\_\_\_ **End:** \_\_\_\_\_

- Meet with your CEO or corporate leadership** to gain their support for the campaign.
- Review and approve your budget.**
- Recruit a campaign team** representing key departments and all levels of your company. Educate your team members on United Way's role in the community.

## 6 WEEKS BEFORE KICKOFF

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Finalize goals & strategies** with your CEO and campaign team.
- Lay out campaign plan** (dates, speakers, theme, events, incentives).
- Assign tasks to your team** (Ex. communications, event coordination).

## 4 WEEKS BEFORE KICKOFF

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Notify your RM** of the campaign materials you'll need.
- Schedule** impact experiences and workplace presentations with your RM.

## 2 WEEKS BEFORE KICKOFF

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Create energy and awareness.** Begin publicizing your campaign.
- Prepare** your CEO video, email or letter to your employees.

## 1 WEEK BEFORE KICKOFF

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Send** CEO video, email or letter to your employees.
- Review event kickoff** with your campaign team.
- Continue publicizing** your campaign.
- Confirm** with your scheduled United Way representative and agency speaker.

## KICKOFF WEEK

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Host your company-wide campaign kickoff event.**
- Present information** about United Way to all employees in presentations and staff meetings.
- Distribute pledge forms** to all employees.
- Be available** to your campaign team and employees to answer questions.
- Continue building awareness** and growing enthusiasm.
- Take pictures and video of your events and send them to your RM.** (Your photos may be shared on social media and in the e-newsletter, print newsletter, and annual report.)
- Thank your CEO** for his/her support.
- Thank every employee** for participating in the campaign.

## CAMPAIGN WRAP UP

**Target Date:** \_\_\_\_\_ **Completed:** \_\_\_\_\_

- Collect all pledge forms.**  
Ask your campaign team to follow up with colleagues who may not have returned their forms. Collecting forms from every individual, regardless of if they gave or not, will confirm that every employee had the opportunity to give.
- Announce your final campaign results.**
- Thank every employee** for their contribution, again. (Ex. verbal recognition, letter, email, small gift, celebration event, etc.)
- Conduct a campaign debrief** with your team and RM.  
Develop a written summary for next year's campaign.
- Congratulate** yourself on a job well done!
- Consider additional impact experiences** (Ex. Day of Caring, Stuff the Bus). Refer to your Corporate Engagement plan to help your company Live United year-round! Don't have a Corporate Engagement plan? Ask your RM for details.