

# CAMPAIGN PLANNING GUIDE

United  
Way



United Way of Berks County

## 6 Steps to Success

### 1. Involve your CEO (8-6 weeks before kick-off)

Ask your CEO to:

- Approve a campaign committee
- Endorse a campaign letter to all employees
- Participate in employee campaign meetings

### 2. Define internal roles and responsibilities

(6-4 weeks before Kick-off)

Don't run your campaign alone! Recruit a committee to help you plan your campaign.

- Diversity is important. Recruit from all various departments throughout your organization
- Set up regular meetings and delegate responsibilities

### 3. Nail down logistics (4-3 weeks before Kick-off)

Determine your timeline, one week for solicitation and one week for follow-up is suggested.

- Set clear kickoff and end dates
- Set a clear attainable goal
- Plan your publicity

### 4. Plan your campaign activities (2-1 weeks before Kick-off)

Hold United Way meetings and events throughout your campaign to get employees together, have fun and learn more about community needs.

- Use United Way resources
- Develop an agenda and invite your Loaned Campaign Specialist (LCS) to speak
- Keep the meeting time to 30 mins max
- Hold a separate Leadership Giving solicitation

### 5. Wrap it up (week of Campaign)

Set a clear end date and communicate to everyone in your organization.

- Collect all pledge forms, whether employees contributed or not
- Have committee members follow up with anyone who did not attend a meeting
- Communicate your campaign results to your organization and to your LCS as soon as possible
- Summarize employee giving using the appropriate envelopes supplied by your LCS

### 6. Say thank you (1-2 weeks post Campaign)

Say thank you to everyone with a special meeting or note from the CEO, and blanket bulletin boards and employee communications with words of thanks. Thank your Committee members, too!



## Why Education, Financial Stability, Health, and Safety Net Services?

United Way creates opportunities by focusing on the building blocks of a good life, and in turn strengthens the community for all of us.

### EDUCATION

Helping children and youth achieve their potential through learning

### FINANCIAL STABILITY

Helping families become more financially independent

### HEALTH

Improving people's health

### SAFETY NET SERVICES

Helping those in crisis

## Using Social Media in Your Campaign

1. Promote your campaign on social media before it starts
2. Post photos of your activities to your company and personal accounts
3. Tag us
4. Use our hashtags (#UWBerks and #UWBerksCampaign)

## BONUS: Sample Agenda

Welcome/Introduction (2min.) Endorsement by CEO (2min.) Labor Endorsement (if applicable - 2min.)  
Campaign Speaker (LCS/Reverse Tour - 9 min.) Campaign Video (8 min. or less)  
Pledge Form Explanation and Incentives (5 min.)