

# 8 STEPS TO SUCCESS: THE ROADMAP TO ACHIEVING YOUR GOALS

*United Way has a road map to campaign success. Follow the “8 Steps” and you have a greater chance of achieving your campaign goals.*

## 1. **CEO Support and Involvement**

- Pledge a company gift (if applicable)
- Commit to holding employee meetings
- Make a personal contribution
- Visibly and actively support the campaign
- Pledge a personal Leadership gift

## 2. **Recruit a capable, committed campaign team**

- Include one person from each department on your committee. Involve labor representatives, if applicable
- Participate in United Way Employee Campaign Coordinator 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 Leadership goals.
- Advertise goal
- Track and report progress regularly

## 4. **Work with United Way to Develop a Campaign Plan**

- Meet with your United Way representative or Loaned Employee to plan an “8 Steps” campaign
- Use United Way campaign tools and materials (Posted on United Way of Racine County website: [www.unitedwayracine.org/ecc\\_toolbox](http://www.unitedwayracine.org/ecc_toolbox) )
- Secure raffle items or incentives for the campaign
- Plan special events to create enthusiasm and raise funds

## 5. **Conduct a Leadership Giving program** (Gifts of \$1,000 or More)

- Conduct a Leadership Giving breakfast or meeting
- Set specific Leadership Giving goals
- Ask senior management to be Leadership Givers
- Discuss Leadership Giving at all employee meetings
- Provide special recognition for Leadership Giving

## 6. **Hold Meetings for All Employees**

- Schedule 20 to 30-minute meetings to reach all employees
- Provide food and door prizes as a way to increase attendance
- Include the United Way campaign video or a speaker from a United Way partner provider
- Ask a co-worker to share a personal story about their experience with United Way
- Educate potential donors about the positive changes their gift makes in the community
- Provide incentives for returning pledge cards
- Follow up with all employees

## **7. Promote, inform and have fun!**

- Build United Way awareness
- Publicize campaign events
- Promote special events
- Ask employees to share personal experiences
- Ask everyone to give
- Have fun!

## **8. Thank, Recognize and Report**

- Report results to United Way and employees
- Post internal thank-you messages: signs, articles, and banners
- Conduct campaign de-brief with United Way and your Loaned Employee
- Publish an internal roster of Leadership Givers and Loyal Contributors
- Attend United Way Victory Celebration on December 10 at Roma Lodge

**GIVE. ADVOCATE. VOLUNTEER.  
LIVE UNITED.**



United Way  
of Racine County