



YOUR CAMPAIGN PLAN FOR SUCCESS

Best Practices for an Effective Campaign



United Way of Tampa Bay

Organization: _____

Date: _____

Chief Executive: _____

Workplace Campaign Objective: To inspire individuals in an organization to increase awareness of community needs and share resources to make a real difference in Tampa Bay.

Chief Executive

- | Last Year | This Year | |
|-----------------------|-----------------------|---|
| <input type="radio"/> | <input type="radio"/> | Secure CEO Support (CEO is aware and supports the campaign) |
| <input type="radio"/> | <input type="radio"/> | Appoint a talented team member as the Campaign Coordinator |
| <input type="radio"/> | <input type="radio"/> | Serve or appoint a senior level executive as Leadership Gifts Chair |
| <input type="radio"/> | <input type="radio"/> | Annually establish and approve employee campaign goals that strive for a greater share of employee giving potential |
| <input type="radio"/> | <input type="radio"/> | Determine Corporate Contribution - Corporate gift or Corporate match |
| <input type="radio"/> | <input type="radio"/> | Pledge a personal leadership gift |
| <input type="radio"/> | <input type="radio"/> | Authorize an Employee Campaign Committee |
| <input type="radio"/> | <input type="radio"/> | Send endorsement letter to employees |
| <input type="radio"/> | <input type="radio"/> | Speak at employee meetings |
| <input type="radio"/> | <input type="radio"/> | Approve company time for:
__Committee Mtgs __Campaign Coordinator Training __Employee Meetings |

Leadership Chair

- | Last Year | This Year | |
|-----------------------|-----------------------|---|
| <input type="radio"/> | <input type="radio"/> | Know and understand United Way's mission and vision |
| <input type="radio"/> | <input type="radio"/> | Lead by example - invest at the leadership level |
| <input type="radio"/> | <input type="radio"/> | Set goal for leadership gifts |
| <input type="radio"/> | <input type="radio"/> | Identify potential leadership investors |
| <input type="radio"/> | <input type="radio"/> | Solicit executive staff and prospects
(one-on-one, hand-deliver personalized leadership pledge card, group meeting, etc) |
| <input type="radio"/> | <input type="radio"/> | Send thank you note to each investor |

Campaign Coordinator: _____

Your role as the Campaign Coordinator is essential in helping your community succeed. The United Way of Tampa Bay impact areas of financial stability, helping children and youth achieve their potential, and basic needs will lead to positive, lasting change. You are building a community of investors at your company who collectively will help meet the needs of Tampa Bay and make this a great place to live, work and play.

Campaign Coordinator

- | Last Year | This Year | |
|-----------------------|-----------------------|--|
| <input type="radio"/> | <input type="radio"/> | Attend Campaign Coordinator Workshop |
| <input type="radio"/> | <input type="radio"/> | Know and understand United Way's mission and vision |
| <input type="radio"/> | <input type="radio"/> | Review or set a goal and a campaign plan |
| <input type="radio"/> | <input type="radio"/> | Plan and schedule department coordinator training |
| <input type="radio"/> | <input type="radio"/> | Educate and motivate your campaign team |
| <input type="radio"/> | <input type="radio"/> | Involve your fellow employees |
| <input type="radio"/> | <input type="radio"/> | Utilize campaign materials (posters, campaign guides, letters, etc.) |
| <input type="radio"/> | <input type="radio"/> | Partner with your United Way Relationship Manager |
| <input type="radio"/> | <input type="radio"/> | Have fun - be creative |
| <input type="radio"/> | <input type="radio"/> | Make the ask |
| <input type="radio"/> | <input type="radio"/> | Say Thank You |
| <input type="radio"/> | <input type="radio"/> | Report results and list of investors to United Way |

Employee Campaign Committee

- | Last Year | This Year | |
|-----------------------|-----------------------|---|
| <input type="radio"/> | <input type="radio"/> | Know and understand United Way's mission and vision, and how their investment will help the community |
| <input type="radio"/> | <input type="radio"/> | Attend committee meetings |
| <input type="radio"/> | <input type="radio"/> | Recommend ideas and suggestions for campaign |
| <input type="radio"/> | <input type="radio"/> | Determine campaign strategies to meet goals/objectives |
| <input type="radio"/> | <input type="radio"/> | Create fundraising incentives for organization |
| <input type="radio"/> | <input type="radio"/> | Say Thank You |
| <input type="radio"/> | <input type="radio"/> | Plan and coordinate year-round special events to supplement the campaign |
| <input type="radio"/> | <input type="radio"/> | Ensure new hires receive information and are invited to participate |

FIVE STEPS to find your Investment Potential

1 Find your Total Potential using one of two formulas:

X.01=

Total payroll	Your organization's Total Potential
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or

X .01 X

Average annual wage	Number of employees
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= Your organization's Total Potential

2 Last year's amount raised:

3 Percent of total potential achieved:

_____ %

4 This year's goal:

5 Percent of potential goal:

_____ %