



**United Way of  
Lebanon County**

## 10 Steps to a Successful Workplace Campaign

- 1. Know your United Way.**  
Familiarize yourself with United Way's role in your community, and how its Signature Service Programs and Community Impact Grants make a real difference.
- 2. Involve your CEO.**  
Meet with your CEO to discuss the objectives of the campaign, approving incentives for participants, and appointing a coordinator for Leadership Giving.
- 3. Develop a strong campaign team.**  
Invite co-workers from all appropriate departments and work groups to join your campaign team, and ask your CEO to appoint a Company Campaign Chair.
- 4. Plan your campaign.**  
Develop a timeline and set a goal for your campaign, choose a solicitation process and plan your events! Be sure to check your United Way of Lebanon County's Campaign Coordinator Toolkit at [www.unitedwaylebco.org/workplace-giving](http://www.unitedwaylebco.org/workplace-giving) for lots of helpful tools.
- 5. Review your last campaign.**  
Host a meeting to discuss the results of your previous year's campaign, develop new strategies and review best practices.
- 6. Promote your campaign.**  
Display United Way posters and materials in appropriate areas, and announce your campaign via your company's communications channels.
- 7. Conduct your campaign.**  
Host a kickoff event with your CEO, promote your activities and special events, and host fundraisers – virtually and in-person.
- 8. Ask for the gift.**  
If you want your colleagues to give, you have to ask! Group solicitation, one-to-one solicitation, and outreach to retirees can all be effective ways to get contributions.
- 9. Wrapping up.**  
Collect pledge forms, distribute incentives, publicize winners, and report your results to your United Way of Lebanon County contact person.
- 10. Thank investors for your campaign success.**  
Be sure to show your appreciation to everyone involved in your campaign – from the CEO and your campaign committee to the employees and retirees – everyone deserves a pat on the back, including you!