



Best Practices for a Successful Campaign



A great campaign isn't just about raising dollars—it's about inspiring people, creating connections, and making giving meaningful. Here's how to make it happen:

Get Leadership on Board:

Secure visible support from top leaders—have them send kickoff emails, attend events, and share why they give.

Set a **challenging but realistic goal** together.

Build a Strong Campaign Team:

Recruit a **diverse group of champions** from different departments.

Assign clear roles (coordinator, communications lead, event planner, etc.).

Rollover Campaigns:

Streamline the process by rolling over existing pledges for returning donors.

This **reduces administrative workload** and ensures consistent giving while giving employees the option to update their pledge if they choose.

Best used for organizations with **steady donor bases** and **consistent giving patterns**.

Plan Early & Communicate Often:

Start early: Outline your timeline, activities, and communication plan.

Use **multiple channels**—emails, posters, videos, team huddles—to keep the campaign top of mind.

Make It Fun & Engaging:

Host kickoff events—lunch & learns, raffles, or themed days.

Offer **incentives** (e.g., prize drawings, department competitions).

Encourage participation with **interactive activities** like quizzes, challenges, or volunteer opportunities.

Share the Impact:

Use **real stories** of lives changed by United Way to make giving personal.

Invite **United Way (staff or Loaned Executives)** or agency speakers to present.

Show how every contribution—big or small—makes a difference.

Promote All Ways to Give:

Highlight payroll deduction, one-time gifts, online giving, and volunteer opportunities.

Make it easy and accessible for everyone to participate (ePledge + printed forms).

Thank & Celebrate Generously:

Acknowledge donors and volunteers publicly and personally.

Celebrate milestones with your team—recognize departments or individuals for going above and beyond.

Evaluate & Improve:

After the campaign, **review what worked and what can be improved.**

Gather feedback from your campaign team and participants.

Share success stories and lessons learned with United Way.