



UNITED WAY

Orange County

CAMPAIGN QUICK GUIDE



YOUR ROLE

You've been given an opportunity to lead something meaningful for your workplace and our community.

It's a chance to take ownership of an effort that matters to your organization, engage your coworkers, and make a positive impact. Keep it simple and make the campaign something you and your workplace can be proud of.

THE SIMPLE CAMPAIGN FORMULA

1

PLAN



Choose a goal, dates, and a simple approach.

2

INVITE



Give everyone a clear opportunity to learn and participate.

3

REMIND



Share a friendly reminder and, if helpful, a progress update.

4

THANK



Celebrate the effort, share results, and turn in materials.



BEFORE YOUR CAMPAIGN

- ☐ **Determine your goal and set campaign dates.** Choose one simple, realistic way to measure progress and set a focused campaign timeframe. About two weeks is ideal for most workplaces—long enough to reach everyone while keeping the campaign visible and moving.
Goal ideas: increase participation from last year • invite returning donors to consider giving \$1 more per pay period • reach every employee with the opportunity to participate • increase payroll deduction participation • set a reasonable dollar goal.
- ☐ **Look at last year's campaign.** What worked? What felt like too much? What would you like to improve?
- ☐ **Get leadership involved early.** Your leadership has already said yes to the campaign by asking you to lead it—now make that support visible. Invite your CEO, plant manager, department head, or another leader to send a short message, introduce the campaign, or take part in the kickoff. You've been trusted with this effort, and bringing leadership in early is a great way to show strong initiative and follow-through.
- ☐ **Build a little anticipation.** Send a simple "save the date" or coming-soon message before your campaign begins to share your goal and get employees thinking about participating in what's ahead.
- ☐ **Consider a small campaign team if it helps.** This can be especially useful for larger workplaces, departments, or multiple shifts.
- ☐ **Reach out to us.** We can help you shape a campaign that fits your workplace.



DURING YOUR CAMPAIGN

- ☐ **Kick off your campaign.** Let employees know the campaign is officially underway. Share your workplace goal, a brief local-impact message, and, when possible, visible support from leadership.
- ☐ **Make the ask and reach every employee.** Give each employee a pledge form and ask them to return it, even if they decline to participate. The form outlines all giving options; your job is to remind employees that every gift matters and that together, small gifts can add up to meaningful workplace impact.
- ☐ **Keep the campaign moving.** Send a friendly reminder before the campaign ends so everyone has had an opportunity to participate and knows how to give.
- ☐ **Wrap up your campaign by November 30.** Collect pledge forms, share your results, and thank employees and leadership for their participation and support.
- ☐ **Complete your Campaign Completion Report.** Don't forget this final step! Complete the report and return it, along with your campaign materials, to United Way of Orange County.

OPTIONAL WAYS TO ADD ENERGY

These are extras, not requirements. A campaign without an event or prize can still be very successful.



SPECIAL EVENTS

A food sale, themed day, department challenge, basket drawing, or another activity your employees already enjoy.



FUN INCENTIVES

A casual dress day, raffle, or small prize can create excitement and encourage participation.



RECOGNITION

Publicly celebrate milestones, team effort, and leadership support.



KEEP IT FUN AND SIMPLE

Match your energy boosters to your culture and what feels right.



WAYS TO STRENGTHEN YOUR CAMPAIGN



Keep it visible. Share a local impact story, quick campaign update, or message from leadership. A few meaningful touchpoints can keep the campaign from getting lost in the day-to-day.



Let leaders be visible. A brief message from the CEO, plant manager, department head, or another respected leader signals that the campaign matters to the organization.



Make giving easy. Payroll deduction can be a convenient option because employees can spread their gift across the year. If your employer offers a corporate match, be sure employees know.



Share local impact. One strong Orange County story or example can be more meaningful than a long list of statistics.



Share progress when it helps motivate your team. If you set a participation or giving goal, provide occasional updates. Keep them positive and encouraging rather than competitive or pressuring.



WE CAN HELP



Tools & Materials

Pledge forms, posters, digital resources, impact stories, and communication templates.



Personal Support

Answers to your questions and ideas to help you plan a strong campaign.



Local Impact

Stories and data that show how gifts make a difference in Orange County.



KEEP THIS IN MIND

- ✓ Every gift matters.
- ✓ Small gifts add up to big impact.
- ✓ Thank your people — it goes a long way!