

PLANNING YOUR EMPLOYEE/WORKPLACE CAMPAIGN

Thank you for partnering with United Way! This is a suggested timeline and checklist for Campaign Coordinators as you plan your employee campaign.

3-4 MONTHS BEFORE CAMPAIGN

- ☐ United Way may reach out to you to help us schedule a Campaign Leadership visit before your campaign. A United Way representative will visit your leadership to discuss how they can support the campaign.

2-3 MONTHS BEFORE CAMPAIGN

- ☐ United Way will reach out to you asking about your participation and material needs.
- ☐ Recruit your campaign committee or department representatives.
- ☐ Plan your kick-off event, campaign dates, and thank you's for donors.
- ☐ Plan activities and incentives.

1 MONTH BEFORE CAMPAIGN

- ☐ Schedule a leadership/managers meeting to introduce the campaign.
- ☐ Create your communication plan to share information about the campaign with your employees.
- ☐ United Way will deliver any requested materials needed for your campaign.
- ☐ Schedule group presentations with a United Way and Partner Agency representative.

1-2 WEEKS BEFORE CAMPAIGN

- ☐ Confirm your online donation page is up to date with all the correct information.
- ☐ Confirm you have all the materials you need to start your campaign. We are here to help! If you require additional items don't hesitate to let us know. We can customize or tailor any materials to meet your needs!

DURING CAMPAIGN

- ☐ Ask all employees to give during group meetings and/or email communication.
- ☐ Share United Way videos and stories as you remind employees to donate.
- ☐ Keep the hype going by offering incentives and updating the team on progress towards your goal.
- ☐ Take photos at your campaign events and tag **@centrecountyunitedway**. United Way will also spotlight your team on social media!

AFTER CAMPAIGN

- ☐ Compile payroll deduction sign-ups and totals with United Way reporting envelope. If cash, checks, or paper pledge forms were collected ensure they are included in the envelope.
- ☐ Share the results and thank employees for donating.
- ☐ Ensure payroll deduction signup information is sent to your company's payroll staff.
- ☐ Meet with your committee to review the results and evaluate your plans for next year.

YEARROUND PARTNERSHIPS

- ☐ Invite new hires to sign up for payroll donations during employee orientation.
- ☐ Mark your calendars for Day or Caring and Taste of the Town.
- ☐ Stay connected with United Way for service and sponsorship opportunities and updates on how your donations impact our community.