

UNITED WAY CAMPAIGN SUGGESTED TIMELINE



United Way of Martin County

Your United Way Representative will work with you to ensure an engaging United Way experience for your company that meets employee engagement and corporate social responsibility goals.

TWO MONTHS UNTIL CAMPAIGN KICKOFF

- Meet with United Way Representative. Review last year's United Way campaign and discuss any changes at your company, including ways that COVID-19 has impacted your workplace. Engage the CEO in these conversations to secure CEO support.
- Create a campaign coordinator committee to help spread awareness about the campaign. Include different departments within your workplace to maximize impact.
- Map out goals. The big players for goals are participation; dollars raised, including dollars directly to United Way; average employee gift and number of leadership donors.
 - Suggested focus areas are: 10% increase in participation or dollars raised.
- Create a communication plan for the campaign and include any other departments that may be needed for support such as marketing or your IT support team.

Bonus points:

- Create a year-round engagement plan with your United Way Representative.
- Set up a volunteer event for leadership at your company to secure their support. Review our virtual engagement menu to see what opportunities are available.

4-6 WEEKS UNTIL CAMPAIGN KICKOFF

- Set dates for your campaign kickoff employee meetings (virtual or in-person) and communicate the dates to leadership at your company as well as your employees. An ideal timeframe for workplace campaigns is 1-2 weeks.
- Once you have set your dates and time, reach out to your United Way Representative to discuss the format best suited for your kickoff.
- Brainstorm and plan a fun kickoff event and secure campaign incentives. See the tools under the Running a Workplace Campaign menu.

Bonus points:

- Encourage stories from within your company to help employees connect United Way to people they know.
- Utilize United Way videos to showcase impactful stories highlighting our mission.
- If using the United Way online giving portal, see website for timeline to set up your portal.
- Start promoting the campaign dates around the office using flyers and posters provided by United Way. Use your creativity!
- Visit our Campaign Toolkit for marketing tools to spread the message.

1 WEEK UNTIL CAMPAIGN KICKOFF

- Send a letter/email from the CEO reminding employees of the campaign kickoff next week, the incentives that will be offered and what to expect. See the email templates page on the website for examples.

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CAMPAIGN KICKOFF WEEK

- **MAKE IT FUN!** Drum up excitement during this week by reminding employees of all events and activities to come.
- Use email templates to send out campaign progress reports and keep the excitement going.
- Send a follow-up reminder to employees who have not responded.
- Track progress of the campaign by regularly pulling giving reports.
- Work with your United Way Representative to create a strategic communication plan.
- Keep track of any cash and checks that are received by filling out the "cash and checks form" located on the United Way Campaign Toolkit

AFTER THE CAMPAIGN – REPORTING RESULTS

- Now the not so fun, but oh-so-important part—completing the report envelope.
 - Because the Workplace Giving Portal reports do most of the work, there will be little to do in terms of reporting your results to United Way.
 - Your United Way Representative will pull a final report of the gifts received during the campaign and send this to you for your payroll department once your campaign closes.
 - Compile any cash or checks that you have received along with the cash and checks form and include those in the final report envelope.
- Once filled out to completion following the checklist provided on the report envelope, you are done! Get it off your hands by turning it in to your United Way Representative! Due to COVID-19, please work with your United Way Representative to determine the best way to get the report envelope to United Way. Please let us know if you have any questions at all, and we would be happy to come over and help you fill this out!

AFTER THE CAMPAIGN

- Wrap up and say thank you. Let your employees know how you did and celebrate!

Bonus points:

Connecting your team to United Way's work through hands-on activities is a great way to develop understanding of the impact that can be made in our community. One exciting way to bring United Way's work to life is to recruit a team to participate in a virtual volunteer opportunity. Be sure to connect with your United Way Representative to discuss available volunteer opportunities.