

# EMPLOYEE CAMPAIGN MANAGER ROADMAP

Utilize this roadmap to customize a timeline for your United Way giving campaign



Company Name: \_\_\_\_\_

Campaign Date: \_\_\_\_\_

## GETTING STARTED

- Meet with your United Way representative to discuss a customized campaign strategy
- Meet with CEO and leadership to discuss campaign goals, offer incentives to donors, confirm corporate gift or match, and secure participation campaign
- Confirm technical requirements and security for virtual options with IT and leadership
- Organize committee to plan and coordinate with key department leads
- Attend Employee Campaign Manager training
- Visit [vsuw.org/ECM](http://vsuw.org/ECM) for ideas
- Set goals, timelines, communication plan, engagement activities, special events, volunteer options and other measures of success

## PLANNING AHEAD

- Develop strategies for incentives for donors, leadership giving, and affinity group participation
- Create a timeline for presentations and activities during campaign
- Plan special events and fundraisers
- Determine, download and distribute necessary collateral
- Send communication from management to employees to set awareness
- Publicize campaign
- Test technical requirements

## KICK OFF

- Confirm leadership attendance and ask them to share a personal anecdote
- Invite staff and collect RSVPs - send reminder and update speakers if necessary
- Host campaign kick off event to officially start your United Way Giving Campaign
- Consider including engagement activities
- Distribute pledge information to employees and share about goals, timeline, special events, education options and incentives
- Make the ask!

## DURATION

- Send communications throughout the campaign to keep enthusiasm high - use all channels to best share about impact
- Provide employees the opportunity to learn more about United Way by hosting volunteer engagement activities, speakers series and open conversations
- Provide employees opportunities to make a financial contribution to United Way by hosting presentations and special events
- Engage internal affinity groups through events and presentations
- Use United Way videos to demonstrate impact
- Provide incentives (ex. hold drawings weekly)

## WRAP UP

- Send final reminders to encourage participation
- Collect pledge information and special event contributions
- Submit final reports to payroll/ human resource department and complete wrap up procedures based on giving processor
- Thank employees for their participation with celebration event or communication
- Announce final campaign results to employees
- Thank campaign committee leadership team, internal groups, other departments for a successful United Way giving campaign
- Coordinate time with United Way representatives to pick up supplies, pledges and special event donations and debrief about successes, challenges and next steps

## ON GOING

- Coordinate engagement opportunities throughout the year

Find resources, messaging, materials, and more to support your United Way campaign at:

[www.vsuw.org/ECM](http://www.vsuw.org/ECM)