

UNITED WAY CAMPAIGN SUGGESTED TIMELINE



UNITED WAY OF GREENVILLE COUNTY

Your United Way Relationship Manager 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 Relationship Manager. 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 Palmetto Society members.
 - 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 Relationship Manager.
- 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 Relationship Manager 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 Coordinator 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.
- Conduct employee campaign meetings at designated times. See “How to Conduct a 30 Minute Campaign Meeting” in the Campaign Coordinator Toolkit.
- 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.
- Keep track of all digital pledges turned in by entering the pledge information on the spreadsheet template provided on the United Way website and then make a copy of each pledge card for your records.
 - If an individual is paying a pledge directly via cash or check, make sure the gift is physically attached to the respective pledge card via paperclip or stapled.

AFTER THE CAMPAIGN – REPORTING RESULTS

- Now the not so fun, but oh-so-important part—completing the report envelope.
 - Use the spreadsheet that you have been using to track pledges to fill in your report envelope.
 - Make sure to include a copy of the pledge cards in the report envelope, as well as any cash or checks you have received.
 - Send a copy of the pledge spreadsheet to your payroll department and your Relationship Manager at United Way.
- 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 Relationship Manager! Please let us know if you have any questions at all, we would be happy to come over and help you fill this out! You can drop off the completed report envelope at the United Way office or we would be happy to come pick it up.

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. Be sure to connect with your Relationship Manager to discuss available volunteer opportunities.