

# PLANNING YOUR EMPLOYEE GIVING CAMPAIGN

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

## 3-4 MONTHS BEFORE CAMPAIGN

- United Way may reach out to you for help scheduling a CEO visit before your campaign. A United Way board member or CEO will visit your CEO or leadership to discuss how they can support the campaign.
- Determine the timeline of your campaign.
- Recruit your campaign committee or department representatives.

## 2-3 MONTHS BEFORE CAMPAIGN

- Meet with United Way staff to discuss the plan for your campaign.
- Plan your kick-off event, campaign dates, and thank yous for donors.
- Plan activities and incentives.
- Set a goal for the number of leadership givers.
- Organize a tour of United Way for campaign committee, managers, and employees that give over \$500 to build excitement for the campaign.
- Participate in a United Way tour with your campaign committee.

## 1 MONTH BEFORE CAMPAIGN

- Create your own communication plan to share information about the campaign with your employees.
- Work with United Way to gather stories, photos, or videos for your communications. United Way can make custom email templates for you.
- Schedule a leadership/managers meeting to introduce the campaign.
- Schedule group presentations with a United Way representative.
- Create a website for collecting employee pledges.
- Bi weekly campaign check-ins with United Way rep and Campaign Committee.

## 1-2 WEEKS BEFORE CAMPAIGN

- Send out highlights of United Way programs; Promote Donor Affinity Groups (Women United, Emerging Leaders, Leadership Giving).
- Confirm your website for collecting payroll deduction sign-ups is up to date.
- Pick up United Way pledge forms or handouts, if needed.

## 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.
- Maintain momentum by offering incentives and updating the team on progress towards your goal.
- Take photos of your campaign events and tag @unitedwayuc. United Way can also spotlight your team on social media!
- Invite leaders and managers to give at the leadership level.

## AFTER CAMPAIGN

- Confirm payroll deduction sign-ups and totals with United Way. If cash, checks, or paper pledge forms were collected, arrange a time to review.
- Share the results and thank employees for donating.
- Ensure payroll deduction sign-up information is sent to your company's payroll staff.
- Meet with your committee to review the results and evaluate your plans for next year.**
- Organize a tour of United Way of partner agency for leadership donors in your company.

## YEAR-ROUND INITIATIVES TO KEEP UNITED WAY OF UTAH COUNTY IN FRONT OF EMPLOYEES' MINDS

- Q1: Participate in Quarterly company volunteer project. Keep in contact.
- Q2: Host an event focused on a specific non-profit or aim of United Way, ex: *Casual Dress Day with proceeds going to a non-profit, book drive for EveryDay Learners, etc.*
- Q3: Participate in United Way's Day of Caring (*This is when most companies run their employee giving campaigns*).
- Q4: Participate with Sub for Santa.
- Events:** EveryDay Strong Resilience Training, Emerging Leaders Society, and Women United.
- Tours:** South Franklin Community Center, Partner Agencies, United Way main offices, Community Action and Services Food Bank.
- Invite new hires to sign up for payroll deductions during orientation.
- Keep in contact with your UW rep on volunteer opportunities and community initiatives.