

# CAMPAIGN TIMELINE AND CHECKLIST



## At Least 6 Weeks Before

- Meet with your United Way representative to develop campaign goals and strategies
- Review the previous campaign's performance, determine opportunities and challenges
- Visit United Way's online campaign toolkit ([UnitedForImpact.org/toolkit](http://UnitedForImpact.org/toolkit)) for materials and ideas
- Meet with your CEO to confirm his or her commitment
- Recruit and train a campaign team
- Set dates for employee meetings
- Develop your specific campaign timeline with dates and goals
- Review our sample email messages and customize for your campaign

## At Least 4 Weeks Before

- Plan your campaign theme and special events
- Ask your United Way representative about speakers for employee meetings
- Request materials, including pledge forms and brochures for all employees
- If you haven't already, begin sending campaign e-communications and announce the campaign Kick-Off Celebration to all employees
- Conduct a leadership giving campaign — *one of the best ways to increase the success of your overall campaign*

## At Least 2 Weeks Before

- Promote your campaign special events and meetings
- Send a reminder about the upcoming campaign and special dates to keep in mind

## During Your Campaign

- Make sure every employee receives materials and has an opportunity to give
- Conduct special events and activities
- Publicize interim campaign results
- Send follow-up emails every few days to keep up enthusiasm and build awareness; include community facts and success stories
- Have fun! Infuse your creativity and build enthusiasm among team members and in no time your campaign will go from good to great!

## After Your Campaign

- Wrap-up, collect all pledges and follow up on outstanding pledges
- Calculate results and submit final reports to United Way
- Announce results to your employees
- Thank all contributors with a celebratory event, letter or email
- Debrief with your team and summarize your findings and ideas for next year!

Coordinating a United Way campaign should be fun and rewarding. Because of you, thousands of our most vulnerable neighbors are able to connect with help to improve their lives. *Your support and extra efforts are what drives our movement to end poverty forward, and on behalf of those who may never have the chance...we say **THANK YOU!***

**United Way is your local partner to drive measurable, lasting Impact that none of us can achieve alone!**

Questions? Contact Jennifer Shumpert at 215-665-2480 or email [ECC@uwgpsnj.org](mailto:ECC@uwgpsnj.org)

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United Way  
of Greater Philadelphia  
and Southern New Jersey



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## Quick Resource Guide: Steps to Planning Your Campaign & Tips for Success as an Employee Campaign Chair



## What is the role of an Employee Campaign Chair (ECC)?

As an ECC, you're a key partner in the movement to end poverty. Your leadership in running an effective United Way campaign is paramount to our ability to improve lives and strengthen communities. The campaign will serve as an important opportunity for your colleagues to learn more about local issues, and how they can help break the cycle of poverty that traps our families for generations.



Need to take your campaign to the next level? Visit [UnitedForImpact.org/toolkit](http://UnitedForImpact.org/toolkit) for posters, co-branded digital images and campaign planning materials.

### Key benefits of being an ECC

- Develop and showcase your project management skills
- Network with colleagues at various levels of your organization
- Take action on important ways you can help your community thrive

## Steps to Planning a Successful Campaign

### 1. Recruit a Campaign Team

Invite members with diverse skills from multiple departments to join your committee, including younger and newer employees who may be new to the campaign but want to make a difference.



Secure leadership support to establish buy-in and have your executive team recognize committee members for going the extra mile!

### 2. Set a Goal

Analyze giving history, assess current workplace dynamics and set aggressive, but achievable, goals. Consider a participation target and an Impact Fund goal. Having shared goals is an important way to increase engagement and participation in the campaign.

### 3. Create the Plan

Choose a fun theme that connects back to your organization and United Way's work in the community. From there, create a simple message, outline a plan and think about what success looks like at your workplace.



Consider the Impact your organization can make in the community. Many successful campaigns connect their organization's corporate social responsibility goals to their United Way campaigns!

To connect with a United Way representative today, call Jenny Shumpert at 215-665-2480 or email [ECC@uwgpsnj.org](mailto:ECC@uwgpsnj.org).

### 4. Kick-off: launch the campaign with excitement!

Draw attention to the campaign with an event that brings your campaign theme to life.



Invite leadership donors and potential leadership donors to a special breakfast or reception with your CEO! Thank them for previous support and encourage them to give generously and help set a strong pace for the campaign. Leaders lead!

### 5. Ask, ask and ask again!

One of the primary reasons that people don't give is that they were never asked.



Recruit and train campaign champions to serve as ambassadors. They can follow-up with people in their department or work area and help answer questions.

### 6. Communicate, communicate & communicate more!

Help people learn about our cause and the Impact of their gifts. Use multiple communication techniques that you know are effective for your workplace. Emails, voicemails, time on agendas in department meetings, or simply just talking up the campaign around the office, can all be effective ways to spread the word!

### 7. Engage your team

Volunteering builds team rapport and inspires more connection to United Way's work in the community.

Host a Day of Caring or simply encourage volunteerism through United Way's volunteer portal at [UnitedForImpact.org/volunteer](http://UnitedForImpact.org/volunteer).

Join United Way in speaking up on issues in your state or community. Learn more about our Public Policy agenda at [UnitedforImpact.org/advocate](http://UnitedforImpact.org/advocate).

### 8. Thank, celebrate and keep in touch

The **most important part** of a successful campaign is a great **THANK YOU!** By thanking employees and sharing campaign successes, you make them feel appreciated and deepen their connection to our mission to end poverty. **Share results and celebrate.** Communicate your campaign success and thank employees for their support company-wide. Ask leadership for their support in sharing the good news and closing the campaign with a celebratory event.



## Fun Campaign Themes:

- ❖ Get in the Game Team Challenge
- ❖ United Way All-Stars: Join the A-Team for Impact
- ❖ Heroes for Change: featuring superheroes for success
- ❖ *Impactopoly*: a fun twist on the game Monopoly
- ❖ MISSION POSSIBLE: Be A Secret Agent for Impact

## Interesting Incentives and Games:

- ❖ Corporate match
- ❖ Jeans or Jersey Day
- ❖ Show Your Spirit Day (College Sports Teams)
- ❖ Prime parking space
- ❖ Early Out or Late-Arrival passes
- ❖ Pizza party
- ❖ Best Pet Photo contest
- ❖ *Best Mug* – HS Yearbook photo match challenge
- ❖ Putt-Putt Contest in the hallways
- ❖ Spa Day (host a massage therapist during lunch)
- ❖ Trivia Challenge via email
- ❖ Chili Cook-Off or Bake Sale
- ❖ Themed Basket Raffle

## Sweet Thanks:

- ❖ Candy Grams seat drop – *You're A Lifesaver!*
- ❖ Video message from the CEO or leadership
- ❖ Breakfast of Champions thank you event
- ❖ Company shout-out of Leadership Givers
- ❖ Share a personal thank you/testimonial from a program recipient

## Join the conversation with #UWGOODNEWS



Follow us on Twitter @PhillySJUnited!



Follow us on our LinkedIn page!

- Connect with other United Way supporters,
- Celebrate each other's successes,
- Learn about new ways to connect to our cause!



The **Campaign Toolkit** is your one-stop shop to get to know

United Way and access the materials and support you need—including brochures about our work, sample email messages, images, videos and more—to coordinate a stellar United Way campaign.

Visit [UnitedForImpact.org/toolkit](http://UnitedForImpact.org/toolkit)