

EMPLOYEE CAMPAIGN MANAGER ROADMAP

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

Valley of the Sun
United Way



Company name:

Campaign Dates:

GETTING STARTED

PLANNING AHEAD

KICK OFF

DURATION

WRAP UP

Meet with your Valley of the Sun United Way representative to discuss campaign strategy that is customized for your company

Meet with CEO and leadership to discuss campaign goals, offer incentives to donors, confirm corporate gift or match, and secure participation in 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 <https://vsuw.org/get-involved/employee-campaign-managers> for ideas

Set goals, timelines, communication plan, engagement activities, special events, volunteer options and other measures of success

Develop strategies for incentives for donors, leadership giving, affinity group participation

Create a timeline for presentations and activities during campaign

Plan special events and fundraisers

Determine and distribute necessary (downloading virtual) materials from VSUW

Send communication from management to employees to set awareness

Publicize campaign

Test technical requirements

Confirm leadership attendance and ask them to share personal anecdote

Invite staff and collect RSVPs - send reminder and update speakers if necessary

Host campaign kickoff event to officially start your United Way Giving Campaign

Consider including engagement activity

Distribute pledge information to employees and share about goals, timeline, special events, education options and incentives

Make the ask!

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 VSUW videos to demonstrate impact

Provide incentives (i.e. hold drawings weekly)

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 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, special event donations and debrief about campaign successes, challenges and next steps

Celebrate!

Debrief with your VSUW CRM to summarize campaign success, opportunities for next year

ON GOING

Coordinate engagement options throughout the year

Find resources, messaging, materials, and more to support your Valley of the Sun United Way campaign at:

<https://vsuw.org/get-involved/employee-campaign-managers>