

CAMPAIGN STEPS & CHECKLIST!

Follow these easy steps for a successful workplace campaign!



United Way of York County

1. Make a Plan and share it with your Corporate Engagement Manager (CEM):

- TIMELINE:** Determine your campaign timeline. Campaigns are most successful when kept around two weeks.
- PLEDGE OPTIONS:** Decide on electronic giving(e-pledge) or paper pledge....or both (*e-pledge with paper for backup or employees without access to company email*). **For e-pledge, contact your CEM to begin site setup no later than 4 weeks before your kick-off date.**
- MATERIAL:** Download material and digital assets for your campaign from Campaign HQ on our website. If you are unable to download or want items like yard signs and posters delivered, contact your CEM.
- MOTIVATION:** Plan goals, special events, and fun incentives. Invite UWYC Staff or employees who already give, to speak at your campaign meetings, or download our campaign video to show.

2. Start Promoting

- Notify ALL employees *and* retirees to save the date for your campaign kick-off!
- Confirm support from all department supervisors and encourage (virtual or in-person) employee meeting participation.
- Wear your Live United T-shirt to show your support! (*Request shirts from your CEM*)
- Hang and share our campaign posters, goal posters and prize posters.

3. Kick Off Your Campaign!

- Use our Sample CEO or Champion Kick-off Letter from Campaign HQ, to kick off your campaign and show Leadership support!
- Start your e-pledge distribution or distribute paper forms to all employees and retirees. Remind them of deadlines and incentives.
- Motivate with special events/activities and employee meetings.
- Communicate consistently throughout campaign to keep engagement using motivational graphics, flyers or videos from our Campaign HQ.

4. Finalize your Campaign

- Total your pledges and follow up on outstanding pledges, especially those who gave last year.
- Complete the Campaign Report Form and attach to an envelope containing any cash/checks or pledge forms. Notify your CEM of your results and if you have an envelope to be picked up.
- Announce results to your employees, thanking them for their support with a morale-boosting message from your CEO.