

UNITED WAY CAMPAIGN SUGGESTED TIMELINE



UNITED WAY OF GREENVILLE COUNTY

The campaign ambassador is an opportunity to show leadership within your role and throughout your organization. Your Corporate Engagement Manager will work with you to ensure an engaging United Way experience for your company, building your organization's culture while meeting employee engagement and corporate social responsibility goals.

TWO MONTHS UNTIL CAMPAIGN KICKOFF

- Meet with United Way Corporate Engagement Manager. Review last year's United Way campaign and discuss any changes at your company. Engage the CEO in these conversations to secure CEO support.
- Map out goals. The big players for goals are participation, dollars raised, average employee gift and number of Palmetto Society members.
- 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.

4-6 WEEKS UNTIL CAMPAIGN KICKOFF

- Set dates for your campaign kickoff employee meetings 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 Corporate Engagement Manager to set up speakers for your employee meetings.
- Brainstorm and plan a fun kickoff event and secure campaign incentives. See the kickoff ideas page on the United Way website.
- Host a Palmetto Society event and invite potential Palmetto Society donors.

1 WEEK UNTIL CAMPAIGN KICKOFF

- Send a letter/email from the CEO reminding employees of the campaign kickoff next week and relaying the importance of United Way.
- Remind employees of the fun kickoff event, the incentives that will be offered and what to expect in the next week. See the email templates page on the website for examples.
- Place United Way posters up around your workplace.

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" guideline on the United Way website.
- 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.
- Visually track progress of the giving campaign by using the a fundraising thermometer.
- Keep track of all pledge cards turned in by entering the pledge information on the

UNITED WAY CAMPAIGN SUGGESTED TIMELINE



UNITED WAY OF GREENVILLE COUNTY

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 Corporate Engagement 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 Corporate Engagement 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.
- Meet with your Corporate Engagement manager to talk through the campaign - did we meet your goal, what were the wins, were are opportunities for next year, campaign ambassador for next year.
- You did it! Now it's time to attend the annual awards celebration early next year.

CONTINUED ENGAGEMENT

Engage your organization through out the year with sponsorships, supply drives, volunteer opportunities, and more.