

Your guide to success!

As an Employee Campaign Manager, you will make a lasting impact

We can't thank you enough for your time and commitment!

As an Employee Campaign Manager (ECM), you are making a big impact in the community. In fact, your efforts will help local people receive educational and financial supports, as well as provide access to basic needs and healthcare. We get it - as an ECM, you're taking on the responsibility of leading your company's fundraising campaign... in addition to your daily job. That's why we're here to support you every step of the way. This two-page timeline guide will help you plan, implement, and achieve your company's fundraising goals. **Without you, we couldn't reach the people you work with and unite those who want to make a difference!**



8 weeks before kickoff

- **Meet with United Way and your CEO and/or senior manager to enlist their help in championing the campaign, discuss a campaign goal, if there is a budget and any incentives they will offer**
- **Recruit and confirm a vibrant campaign committee** with cross-departmental and CEO/management support.
- Consider committee member roles to oversee campaign co/vice-chair(s), communications, leadership giving, special events, HR/payroll, IT/technical support (if electronic campaign – ePledge)
- Consider recruiting department representatives to help promote the campaign and activities/events in their departments
- Determine training date and meeting schedule for campaign committee
- Meet with your local United Way contact
- Review strategy and results from previous campaigns
- Review previous investor list and determine if anyone has left the organization
- Choose campaign dates & set your campaign goal
- Discuss campaign activities: campaign kickoff event, leadership event, volunteer projects and/or special event fundraisers
- Review and confirm ePledge campaign requirements if electronic campaign
- Go to UnitedWayGSO.org/Campaign-Toolkit to check out ideas on special events and volunteer projects

6 weeks before kickoff

- **Train committee and hold your first campaign committee meeting**
- Develop a communication plan and discuss campaign tactics and timing
- **Plan and schedule campaign activities:** campaign kickoff event, leadership event, volunteer projects and/or special event fundraisers
- Explain leadership campaign strategy, leadership investor circles
- Determine campaign and promotional materials, including pledge forms – what United Way can provide and what needs to be created by the committee
- Request United Way and/or agency speaker(s) and/or tours from your United Way contact
- Talk with HR to establish a plan to solicit retirees and new hires
- Go to UnitedWayGSO.org/Campaign-Toolkit to check out campaign materials, videos and more
- If needed, go to UnitedWayStore.com to purchase branded United Way materials

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3,000 households by 2030

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3 - 4 weeks before kickoff

- Work with your United Way contact to create personalized leadership giving packets
- **Have CEO or campaign chair create personal endorsement or support statement - include in leadership packet**
- Have department managers/representatives announce the campaign at staff meetings
- Solicit retirees
- Finalize any outstanding ePledge requirements if electronic campaign

1 - 2 weeks before kickoff

- **Launch campaign communications** - include stories of impact
- Send CEO communication to all employees - (letter or e-mail)
- Hold leadership campaign with event and distribute their giving packets
- **Solicit a gift from all campaign managers and leadership.** Ask your managers to lead by example and start your campaign with their gifts in first.
- Test ePledge system if electronic campaign
- See your United Way representative for ideas on sample communications and visit UnitedWayGSO.org/Stories

During the campaign

- **Hold kickoff event(s) to build enthusiasm for the campaign – encourage 100% attendance**
- Ask your coworkers to make a gift and invest in the work of United Way
- Confirm campaign committee and department representatives have talked to all employees
- Hold giveaways and drawings for those who make a pledge
- Follow up with past contributors who have not yet responded
- Hold special events for colleagues to make your campaign fun and successful
- Report progress to all employees regularly and submit interim progress report to United Way
- See your United Way representative for ideas on kickoff events

Soon after the campaign - wrap up

- Determine final results and meet with leadership to discuss
- **Submit final results to United Way within two weeks after closing**
- Announce total amount raised to employees
- **Thank / recognize all contributors and share United Way's Thank You video**
- Hold thank you event(s)
- Work with your United Way contact to develop a strategy for those who have previously given but have not yet responded
- Have final meeting with campaign committee - What worked, what didn't, suggestions for next year
- **Discuss year-round engagement with your United Way local contact** - Determine any year-round activities to hold with United Way so employees see and hear updates on the impact of their gifts (volunteer projects, lunch and learns, etc.)
- Select chairs for next year's campaign
- Work with HR to allow payroll deductions for lapsed employees and to solicit new employee as they are onboarded
- Go to UnitedWayGSO.org/Campaign-Toolkit to check out the thank you video and campaign closing procedures

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