

UNITED AT WORK: YOUR CAMPAIGN PLANNING GUIDE

A Step-by-Step Guide to Building Campaign Momentum

As an Employee Campaign Manager (ECM), you help unite your workplace around something bold and deeply local: ending poverty in Greater Greensboro. This guide will help you plan, launch, and celebrate a campaign that inspires generosity, builds momentum, and connects employees to the impact we can make together. United is the Way.

All resources referenced in the guide can be accessed via the Campaign Toolkit:

UnitedWayGSO.org/Toolkits-Resources

8 WEEKS BEFORE KICKOFF - PLAN

- Meet with your United Way rep to learn about why running a United Way campaign is important, the impact your organization makes in the community, review results, donor engagement, and opportunities to strengthen this year's campaign.
- Meet with United Way and CEO/senior leadership to align around goals (impact, dollars or participation), campaign timing, budget, incentives, and events that inspires action. Discuss corporate gifts, matching gifts, sponsorship opportunities, and other ways your organization can support the campaign.
- Recruit a cross-department campaign committee and assign clear roles for leadership, communications, events, HR/payroll, and technical support.
- Set campaign committee training date and meeting schedule.
- Build your campaign: Determine peer-to-peer outreach and in-person, virtual, or passive activities to engage your workplace. United Way can support with speakers, educational experiences, volunteer opportunities, donation tools, and campaign resources.
- Shape campaign experiences that connect employees to United Way's mission, from kickoff events to volunteering and fundraisers, adjusting based on staff ability to attend: in-person, virtual, or hybrid.
- Consider year-round engagement opportunities where United Way can provide mission updates through volunteerism, lunch & learns, presence at employee resource events, impact updates, and other engagement opportunities.
- Review and confirm ePledge requirements, if applicable.

6 WEEKS BEFORE KICKOFF - PLAN

- Train the committee and hold your first meeting to build momentum.
- Create a communications plan that shares United Way's local impact and invites employees, retirees, and new hires to participate.
- Plan campaign activities that connect employees to the mission, such as kickoff events, volunteering, and fundraisers. Speak with United Way if Square is needed to collect credit card payment for fundraisers.
- Gather materials that educate, inspire, and make giving easy, including pledge forms, impact stories, and branded resources.
- Request United Way or partner speakers to bring the mission and local impact to life.
- Purchase branded United Way materials from UnitedWayStore.com, if needed.



3 - 4 WEEKS BEFORE KICKOFF - PLAN

- Prepare leadership giving materials that connect generosity to local impact.
- Ask your CEO or campaign chair to share why United Way matters and invite employees to move Greensboro forward.
- Equip department leaders to introduce the campaign and invite employees into the mission.
- Invite retirees to participate.
- Finalize ePledge requirements, if applicable.

1- 2 WEEKS BEFORE KICKOFF - ASK

- Launch communications with impact stories.
- Send a CEO or senior leader message connecting the campaign to your values and United Way.
- Host a leadership giving event that inspires early participation and generosity.
- Invite leaders and managers to give early, model support, inspire participation and build campaign momentum.

DURING THE CAMPAIGN - ASK, ENGAGE & INSPIRE

- Invite coworkers to support United Way's local work to end poverty and build lasting stability.
- Give every employee a chance to hear the message, ask questions, and see their impact.
- Hold giveaways or drawings to celebrate employees who pledge.
- Follow up with past contributors who have not yet responded.
- Host special events that make the campaign engaging and fun.
- Share progress with employees and United Way to celebrate momentum and reinforce impact.

SOON AFTER THE CAMPAIGN - THANK & WRAP UP

- Finalize results with leadership, celebrate progress, and note opportunities for continued engagement.
 - Submit final results to United Way within two weeks. Review the Campaign Toolkit for closing procedures.
 - Announce the total raised and thank employees for powering local impact.
 - Recognize contributors, committee members, and campaign champions.
 - Debrief with your committee and United Way to capture wins and improvements for next year.
 - Plan year-round engagement opportunities, such as volunteering, Lunch & Learns, impact updates, and community events, to keep employees connected to the mission.
 - Select next year's campaign chairs.
 - Work with HR to support payroll deductions for lapsed and new employees.
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