

EMPLOYEE CAMPAIGN COORDINATOR

YOUR CAMPAIGN CHECKLIST

Prior to the Campaign

- Review company's prior year giving
- Meet with CEO to confirm commitment, monetary goals, incentives for giving, his/her personal endorsement and discuss resources
- Ensure Payroll Deduction is available through your HR office
- Recruit a campaign committee
- Develop a strategy, plan activities, events
- Establish a goal
- Determine multiple ways to reach employees/retirees and the type of campaign best suited for your company:
Via email, phone, Zoom...using a one-on-one solicitation, group meetings, or combination
- Establish a campaign timeline
- Provide United Way Campaign Coordinator with the dates you will run your campaign, the type of campaign materials that will be needed, and the number of employees/retirees to prepare for
- Are there any employee testimonials you could use (employees helped by United Way funded agencies)?
- Publicize campaign to your employees, before and during



During the Campaign

- Kick off your campaign at a company event/meeting... for those working remotely, consider a virtual Kickoff event
- At Kickoff, explain what United Way does. Have management tell why the company supports United Way.
 - Share your goal, any special event(s) planned, incentives and campaign deadline with employees
 - Provide pledge forms to all employees and explain pledge options: *payroll deduction, cash, check; credit card and PayPal* payments may be paid via www.unitedwaydpc.org.
- Give reminders of deadlines and let employees know where they should turn in their completed forms/monies.
- At the end of your company campaign, gather all completed forms/monies and ensure it all reconciles.

After the Campaign

- Submit to **United Way** the Workplace Campaign Report envelope. Ensure that:
 - checks are made payable to: United Way of Danville-Pittsylvania County
 - cash & checks are attached to corresponding pledge forms (yellow copy)
 - payroll deduction forms (yellow copies) are enclosed
 - envelope total reconciles with forms enclosed
 - the Workplace Campaign Report envelope contains all completed pledge forms (yellow copies), cash & checks, credit card/PayPal amounts (if applicable) and be sealed
 - the Workplace Campaign Report envelope has each section filled out
 - a call is made to United Way for pickup
- Report to **Company HR/Payroll Office**
 - Turn in all completed payroll deduction forms (**white copies**) to your company's payroll office.
- Report campaign total to **all employees** and thank them (committee, leadership and employees) for participation!



UNITED for Impact!!!