



United Way of Greater
Richmond & Petersburg

A Guide for Employee Campaign Managers

Three easy steps to a successful workplace campaign!

Congratulations on becoming your company's United Way Employee Campaign Manager (ECM)! This guide is designed to make your ECM experience rewarding and your workplace campaign successful.

1. PLAN

Develop a plan with your United Way Relationship Manager (RM). Ask your RM about your company's campaign history. Take this opportunity to educate yourself about United Way and its impact in your community. Attend United Way sponsored trainings if possible!

Secure support from management. Meet with your senior leadership and confirm their support along with an endorsement from your CEO. Discuss campaign ideas and set campaign dates and goals. Confirm any corporate gift or corporate match for employee giving.

Develop a leadership giving plan. Recruit a Leadership Chair and solicit leadership gifts prior to your campaign kick-off.

Build a strong campaign team. Create a team that is large enough to help you easily manage the campaign. Including employees from all levels and departments will not only lighten your workload, but will increase involvement across the organization.

Mark your calendar. Connect with your RM to coordinate campaign activities, secure speakers, and plan special events.

**Access the online
Campaign Toolkit
for posters, flyers,
templates, and more
at
yourunitedway.org**

2. RUN

Promote the campaign. Publicize your campaign via emails, posters, intranet, and word of mouth at least one week before the kick-off.

Kick off the campaign. Hold a company-wide event or meeting to educate and inspire support. Your RM can help you formulate kick-off and presentation ideas.

Promote giving. Encourage giving through payroll deduction with fun contests and/or incentives. Implement creative campaign activities and special events. Make sure all employees have the opportunity to give.

Share progress. Regularly publicize campaign progress and follow up with those who have not yet turned in their pledge form.

3. CLOSE

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Thank and celebrate. Share your results and celebrate your company's success with a special event to thank all supporters!

Report campaign results to United Way. Prepare reporting envelopes or spreadsheets for the final count. If using local pledge forms, schedule a time with your RM to review results and turn in pledge forms, cash, and checks within two weeks of closing your campaign.

Black Envelope – Payroll Deduction and Direct Bill Gifts; verify the number of pay periods is correct on the pledge forms.

Green Envelope – Cash and Check Gifts; confirm the total of cash and checks matches the corresponding pledge forms.

Red Envelope – Special Event Cash and Checks; please note that Special Event donations may *not* be designated.

If your organization uses a **company-branded pledge form/electronic giving platform**, please **share your total results with your RM** if possible.

Keep in touch! Your United Way has opportunities throughout the year to educate employees, increase volunteerism, and hear about program success. Let your fellow employees know how their gift is helping our community!