



CHECKLIST FOR SUCCESS

BEFORE THE CAMPAIGN

- Meet with your United Way representative.
- Attend United Way Employee Campaign Manager (ECM) workshops.
- Meet with top management at your company, if appropriate and applicable, to confirm their commitment and level of participation.
- Recruit your campaign team, assign roles and responsibilities, and hold planning meetings.
- Set a beginning and ending date for your campaign.
- Determine a campaign goal and theme.
- Order campaign materials – collateral and United Way-branded incentives – from your United Way representative.
- Schedule events and work with your United Way representative on a time for them to come speak at your company.

DURING THE CAMPAIGN

- Hold campaign events, including a fun kick-off event and special events throughout the campaign to incentivize your co-workers to give.
- Invite your United Way representative to come and speak at your company.
- Send email updates throughout the campaign including goal progress, event info, and/or links to a video.
- Create friendly competition between departments or company locations.
- Distribute pledge forms or send out info about how to pledge online.
- Offer incentives based on timely return of pledge cards, participation and/or specific giving levels.

- Take pictures and video of your great events and send them to your United Way representative.

AFTER THE CAMPAIGN

- Congratulate yourself on a job well done and share the results with your colleagues!
- Collect pledge forms and connect with your United Way representative to arrange for pick-up. Or, if it's an online campaign, coordinate wrap-up with your United Way representative.
- Thank all the employees at your company who graciously gave money or donated their time to volunteer to help our nonprofit community.
- Debrief the campaign – and let us know your feedback so we can improve our service to you!

ONGOING

- Plan year-round volunteer projects – we can help!
- Your United Way representative will share info with you about how donors' gifts are making an impact. If you wish, you can share this with your team as well.
- New Hires - work with your HR Department to ensure all new hires have an opportunity to give.



United Way
of Pioneer Valley