



Your role as campaign manager is critical. You are

the champion of one of the community's most valuable ways to take care of its people—**United Way**. We know that taking the responsibility for your company's United Way campaign is a lot of work in addition to the job you do each day. We are here to support you!

This guide is a step-by-step timeline to help you plan, implement and achieve your company's United Way goals. Without you, we could not reach the individuals you work with—but with you, we can unite all those who care and truly make a difference for our community. We can't thank you enough for your time and commitment!

Your Campaign Timeline

6 Weeks before Kickoff

- Meet with your CEO and/or site manager to enlist help in championing the campaign
- Determine which staff positions you'll need for your company's campaign committee – chair, leadership campaign manager, communications manager, HR/payroll representative
- Recruit committee
- Determine agenda and training for committee
- Meet with your UWGAT liaison to
 - Review strategy and results from previous company campaign
 - Choose campaign dates
 - Plan projects
 - Review electronic campaign requirements (if using portal)

4 Weeks before Kickoff

- Hold first campaign committee meeting
 - Help organize and communicate with employees
 - Develop a plan and discuss campaign tactics and timing
 - Explain leadership giving societies and strategy
 - Plan and schedule leadership event
- Check/order campaign materials (*check out uwgat.org*)
- Request agency speaker(s) and/or tours through your UWGAT liaison
- Talk with HR about a plan to solicit retirees

2 Weeks before Kickoff

- Work with your UWGAT liaison to create personalized leadership pledge forms
- Have CEO create personal endorsement (if not CEO, campaign chair) (*check out uwgat.org*)
 - Make a plan to send to all employees
 - Include in leadership packet
 - Include on portal welcome screen
- Have department managers announce campaign at staff meetings
- Identify campaign representatives for each department
- Solicit retirees (*check out uwgat.org*)

1 Week before Kickoff

- Launch campaign communications and promotion
- Train and solicit campaign reps from each department
- Send CEO communication to all employees (letter or email)
- Launch leadership campaign with special solicitation (event?)
- Test portal

During the Campaign

- Hold a kickoff event to build enthusiasm (*check out uwgat.org*)
- Hold special events for colleagues from every level to make it fun
- Publicize results of leadership campaign
- Conduct employee solicitation and encourage participation
- Hold giveaways and drawings for those who have returned their pledge forms
- Confirm that campaign reps have talked to all employees
- Follow up with past contributors who have not yet responded
- Report progress to all employees regularly and submit progress reports to UWGAT liaison

Soon After Campaign – Wrap Up

- Work with your UWGAT liaison to develop strategy for those who have previously given but have not yet responded
- Determine final results and meet with CEO/campaign chair to discuss
- Announce total amount raised to employees
- Conduct final meeting with campaign committee
 - What worked, what didn't
 - Suggestions for next year
- Thank/recognize all contributors
- Submit final results to UWGAT
- Discuss implementation plan for new hires
- Hold thank you event(s)
- Discuss year-round engagement with UWGAT liaison
- Select chair for next year's campaign

Thank you!

Your United Way representatives is: _____

Phone: _____

Email: _____

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