

# EMPLOYEE CAMPAIGN MANAGER ROADMAP

United Way  
of Northern Arizona



Utilize this roadmap to customize a timeline for your United Way giving Campaign

Company name

Campaign Dates:

## Getting Started

## Planning Ahead

## Kick Off

## Duration

## Wrap Up

- Meet with your UWNA representative to discuss campaign strategy that is customized for your company
- Meet with CEO and leadership to discuss campaign goals, offer incentives to donors, confirm corporate gift or match, and secure participation in campaign
- Confirm technical requirements and security for virtual options with IT and leadership
- Organize and coordinate with key department leads
- Attend a Campaign Coordinator Training
- Visit [www.nazunitedway.org](http://www.nazunitedway.org) for all campaign items
- Set goals, timelines, communication plan, engagement activities, special events, volunteer options, and other measures for success

- Develop strategies for incentives for donors, leadership giving affinity group participation
- Create a timeline for presentations and activities during campaign
- Plan special events and fundraisers
- Determine and distribute necessary (downloading virtual) materials
- Send communication from management to employees to set awareness
- Publicize campaign
- Test Technical requirements

- Invite staff and collect RSVPs – send reminder and update speakers if necessary
- Host campaign kickoff events to officially start your United Way Giving Campaign
- Confirm leadership attendance and ask them to share personal anecdote
- Consider including engagement activity
- Distribute pledge information to employees and share about goals, timeline, special events, education options and incentives
- Make the ask!

- Send communications throughout the campaign to keep enthusiasm high. Use all channels to best share about impact
- Provide employees the opportunity to learn more about United Way by hosting volunteer engagement activities, speaker's series and open conversations
- Provide employees opportunities to make a financial contribution to United Way by hosting presentations and special events
- Engage internal affinity groups through events and presentations

- Send final reminders to encourage participation
- Collect pledge information and special event contributions
- Submit final reports to payroll/human resource department and complete wrap up procedures based on giving
- Thank employees for participation with celebration event or communication
- Announce final campaign results to employees
- Thank campaign committee leadership team, internal groups, other departments for helping make the campaign a success
- Coordinate time with United Way representative to pick-up left-over supplies, pledges, special event donations and debrief about campaign successes, challenges and next steps
- Celebrate!

Find resources, messaging, materials, and more to support your United Way of Northern Arizona campaign at:

[www.nazunitedway.org/getinvolved](http://www.nazunitedway.org/getinvolved)